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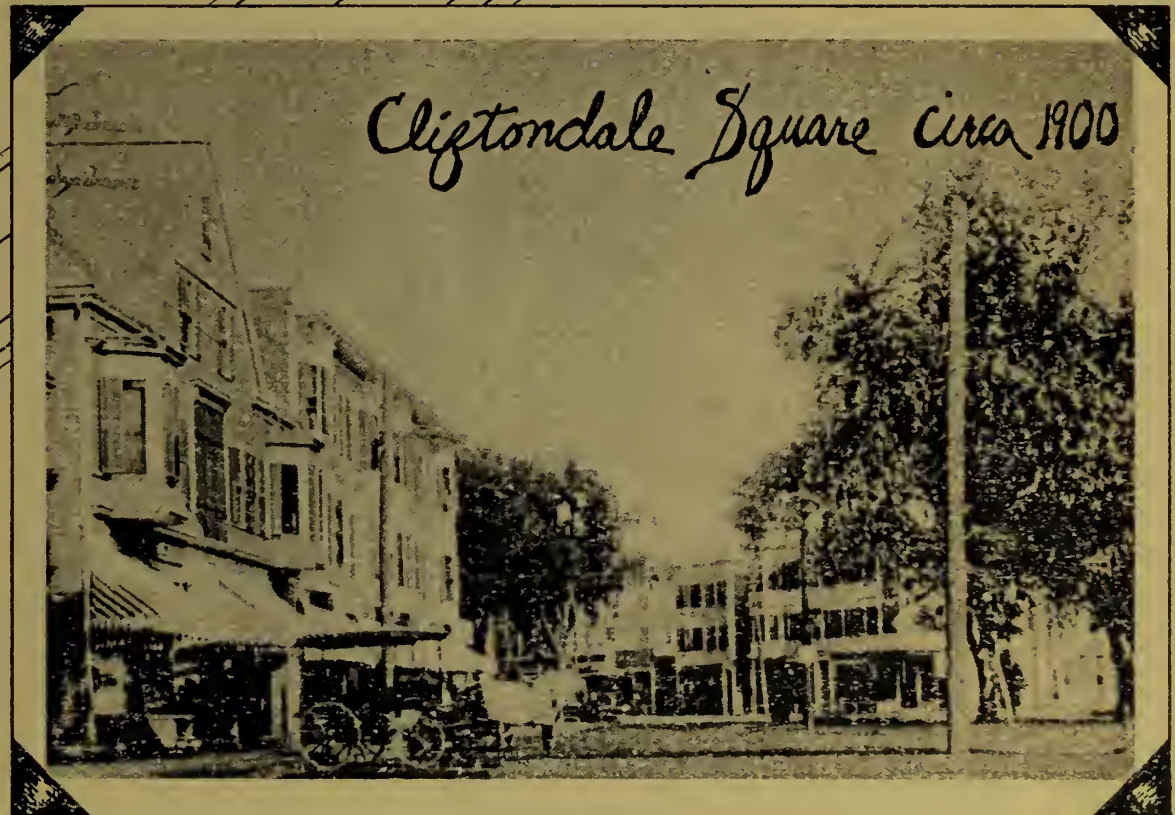
CLIFTONDALE SQUARE REVITALIZATION PROJECT

APRIL 1982

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UNIVERSITY OF MASSACHUSETTS
CLIFTONDALE

Metropolitan Area Planning Council



CLIFTONDALE SQUARE
REVITALIZATION PROJECT
SAUGUS, MA

Prepared by the Metropolitan Area Planning Council
110 Tremont Street
Boston, MA

April, 1982

ABOUT THIS REPORT

The Clifftondale Square Revitalization Project was prepared by the Metropolitan Area Planning Council for the town of Saugus. The Metropolitan Area Planning Council is the officially designated regional-planning agency for 101 cities and towns in the Boston metropolitan area. The Council helps its member communities plan in the areas of land use, environmental protection, historic preservation, solid waste, hazardous materials, air quality, housing, and economic development.

The preparation of this document was assisted financially by the cities and towns of the MAPC region, the Clifftondale Square Merchants Association, and through a federal grant from the Economic Development Administration.

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INTRODUCTION



I. INTRODUCTION

Improved highway systems and the emergence of shopping malls and industrial parks have altered shopping and commuting throughout New England, and have created economic shifts too. Community centers, traditionally the hub of local commercial, industrial, and government activity, have suffered economically as a result. Recognizing the importance of city and town centers to both the identity and the economic stability of individual communities and to the region as a whole, the Metropolitan Area Planning Council (MAPC) has developed a program for downtown revival called Center Revitalization.

Through the Council's 1981 annual solicitation of technical-assistance projects, MAPC accepted a request from the town of Saugus for assistance in developing such a plan for Cliftdale Square. The objectives of this plan include: improvement in economic conditions in the Square; improvement in the appearance and functioning of the Square as a place to shop, work, and live; and improvements in parking conditions. To aid in planning, a task force of Cliftdale Square merchants and community officials was formed.

MAPC's analysis of Cliftdale Square is in three parts. Part I focuses on local market factors and the results of business and shopper surveys; Part II is a technical analysis of parking conditions; and Part III examines design problems in Cliftdale Square. The major findings and recommendations of this study are outlined below.

A. SUMMARY OF FINDINGS

1. Economic

- Population, per-capita-income, and employment statistics show that Saugus's economy has been stable in recent years. Rising income, housing-unit, and employment levels indicate that there is ample opportunity for Cliftdale Square to tap growing markets.
- Business and shopper surveys indicate that the number and variety of goods and services offered in the Square could be improved.
- The large percentage of business in Cliftdale Square that reported constant or growing sales and the many that reported plans to improve their businesses indicates that the Square is healthy commercially.

- Businesses reported that Clifftondale Square's convenient location was its greatest asset and lack of parking its weakest point.
- Shopper survey results indicate that Clifftondale Square is a convenience shopping area mostly patronized by Saugus residents. Parking was listed most frequently by shoppers as the Square's major problem.

2. Parking and Traffic

- The largest parking facility in Clifftondale Square, the church lot, is used almost exclusively by commuters and post-office employees. Shoppers are severely limited by existing on-street spaces.
- In the main commercial section of Clifftondale Square, utilization of primary spaces is very high-- 82.5 percent. A level of 80 percent is generally termed as saturation.
- Primary spaces are being occupied by long-term parkers due to the shortage of off-street spaces.
- A supply/demand parking comparison indicated a shortage of approximately 38 spaces in the Lincoln Avenue area. The parking-duration analysis identified a need for moderate to long-term off-street facilities to alleviate this problem.
- The most severe tie-ups occur when rush-hour traffic and MBTA buses converge on the rotary.

3. Design

- Storefronts and signs in Clifftondale Square must be improved to upgrade the overall appearance of the Square and to make it more competitive with neighboring downtowns and shopping centers.
- Better sidewalks, crosswalks, street furniture, and landscaping are the kinds of pedestrian amenities needed to make the Square a more comfortable and functional shopping area.
- Clifftondale Square has some beautiful open spaces but lacks open space which is accessible to the public.

B. MAJOR RECOMMENDATIONS

1. Parking and Traffic

- MAPC recommends the construction of a parking lot with 35 spaces between Smith Road and Ernest Street, connecting to an existing lot behind the Saugus Bank and Trust Company. Also recommended are two pedestrian alleys leading to the proposed lot. Lincoln Avenue crosswalks should be relocated to correspond with the proposed new parking lot and pedestrian ways.
- Saugus should apply for a Commercial Area Revitalization District (CARD) designation for Clifftondale Square. CARD designation will enable Clifftondale Square to apply for state financial assistance for parking lot construction.
- On-street parking along Lincoln Avenue should be realigned and repainted, to accommodate new crosswalks and pedestrian systems.
- The current two hour on-street parking limit should be changed to a one hour limit along Lincoln and Essex Streets to achieve maximum use of on-street spaces.
- The Council recommends that the bus stop in front of Clifftondale News, now used by MBTA bus #430 and #426, be removed and two replacement stops be created elsewhere. (See Map A on Page 4).

2. Storefronts and Signs

- Saugus has an excellent sign bylaw that should be enforced by town officials.
- Design guidelines should be adopted and promoted by the Clifftondale Square Merchants' Association. If a mortgage pool is established for storefront improvements, loan approval should be subject to a design review based on adopted guidelines.
- Storefronts should be maintained and improved by individual merchants and property owners. For properties over 40 years old, tax credits for building improvements are now available under the Economic Recovery Act of 1981.
- An awning program would greatly improve storefronts in the square and would unify Clifftondale's old and new buildings. Such a program should be coordinated by the Merchants' Association.



CLIFTONDALE SQUARE REVITALIZATION PROJECT

Town of Saugus, Massachusetts

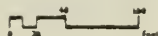
MAJOR PARKING AND TRAFFIC RECOMMENDATIONS:

== New Crosswalks

▢ Pedestrian Alleys

XXXX Relocated Bus Stops

▨ Off-street Parking Lot



This map has been prepared for planning purposes only.
A greater degree of accuracy is required for engineering documents.

WORK BY
Saugus Associates, Inc., Proj.
Saugus Engineering, Inc.
for Phase I/II
Saugus Traffic Study, 1981

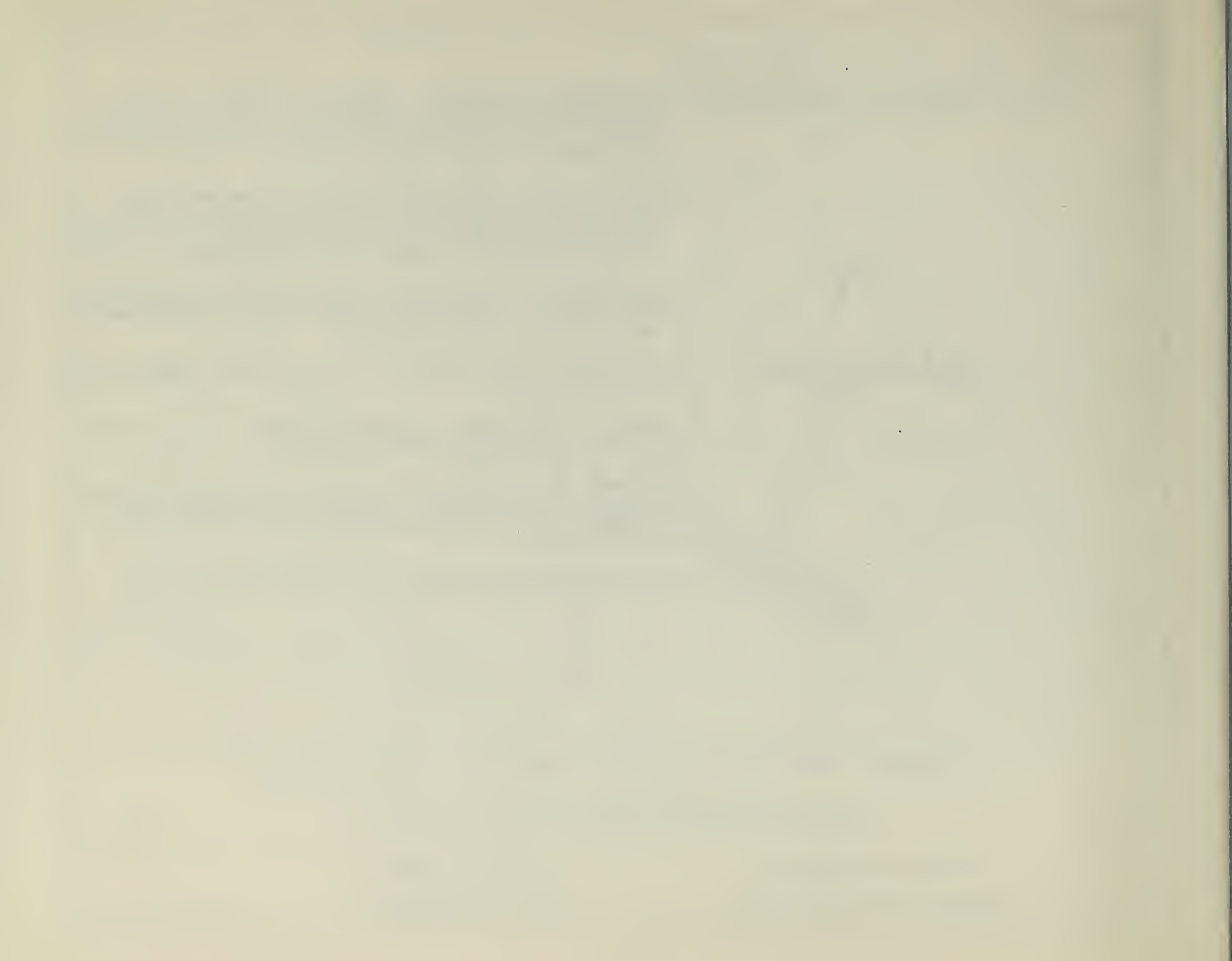
PREPARED BY
Saugus & The Boston Region

PREPARED BY
T. S. S. Associates

Map Saugus 4/8/82 Rev. 1981

3. Pedestrian Ways and Amenities -- Sidewalks and storefronts leading to the church lot should be improved, to entice more commuters to shop in Cliftondale Square. A new pedestrian alley leading from the church lot to Lincoln Avenue is also proposed.
- Two pedestrian alleys should be developed between Lincoln Avenue and the proposed parking lot. Crosswalks should be added where these alleys meet Lincoln Avenue and the crosswalk in front of Cliftondale News should be eliminated.
- New pedestrian alleys should be landscaped and should contain sitting areas. Landscaping and amenities along Smith Road and Jackson Street should be improved.
4. Open Space and Gateways -- Park benches should be placed in front of the Methodist church on Lincoln Avenue.
- Gateways to the Square, particularly those on Lincoln Avenue, should be landscaped with flowering trees.
- Overhead wires should be placed underground and special paving materials added to gateways if another major public works project is undertaken that requires tearing up the existing street surfaces.

These findings and recommendations are explained in the text.





ECONOMIC ANALYSIS

II. ECONOMIC ANALYSIS

A. POPULATION AND INCOME

Population and income statistics are essential to any examination of market-area characteristics. Such statistics define a market's limitations and indicate an area's economic strength.

As Table 1 shows, population in Saugus has decreased slightly since 1970. According to the 1980 Census, Saugus has some 360 fewer people than a decade ago--a decline of 1.5 percent. Most surrounding communities, however, experienced even greater population declines, which indicate that Saugus is one of the more stable communities in its area.

Table 2 shows that the number of housing units occupied by Saugus residents actually rose by 13.4 percent between 1970 and 1980 despite the decline in population. This reflects the national trend toward smaller household size. Therefore, while there were fewer people living in Saugus during the 1970's, a growing number of them were forming independent households. The number of housing units in Saugus rose faster than in surrounding communities.

Preliminary projections that have been prepared by MAPC show Saugus's population remaining stable through 1990 with no significant growth. By contrast, the surrounding area is projected to experience a slight drop in total population. Future population estimates are shown in Table 3.

TABLE 1 - POPULATION

TOWN	1970	1980	CHANGE	% CHANGE
Saugus	25,110	24,746	- 364	- 1.5
Lynn	90,294	78,471	-11,823	-13.1
Lynnfield	10,826	11,267	+ 441	+ 4.1
Malden	56,127	53,386	- 2,741	- 4.9
Melrose	33,180	30,055	- 3,125	- 9.4
Revere	43,159	42,423	- 736	- 1.7
Wakefield	25,402	24,895	- 507	- 2.0
TOTAL	284,098	265,243	-18,855	- 6.6

Source: Bureau of the Census, PHC80-V-23, March 1981.

TABLE 2 - HOUSING UNITS

TOWN	1970	1980	CHANGE	% CHANGE
Saugus	7,326	8,307	+ 981	+13.4
Lynn	32,603	32,617	+ 14	-
Lynnfield	3,011	3,570	+ 559	+18.6
Malden	19,293	21,464	+ 2,171	+11.3
Melrose	10,219	10,973	+ 754	+ 7.4
Revere	14,635	17,176	+ 2,541	+17.4
Wakefield	7,853	8,817	+ 964	+12.3
TOTAL	94,940	102,924	7,984	+ 8.4

Source: Bureau of the Census, PHC80-V-23, March 1981.

TABLE 3 - POPULATION PROJECTIONS*

TOWN	% CHANGE 1980-1990	1980	1985	1990
Saugus	-0-	24,746	24,700	24,700
Lynn	-5.7%	78,471	76,200	74,000
Lynnfield	-0-	11,267	11,300	11,300
Malden	-5.8%	53,386	53,300	50,300
Melrose	-5.8%	30,055	29,200	28,300
Revere	-0-	42,423	42,400	42,400
Wakefield	-0-	24,895	24,900	24,900
<u>TOTAL</u>	-3.5%	265,243	262,000	255,900

* These forecasts are preliminary, subject to revision before their final adoption by MAPC.

Source: PRELIMINARY: INTERIM POPULATION FORECASTS 1980-2010, MAPC Municipalities. Metropolitan Area Planning Council, Boston, 1981.

Per-capita income increased by \$2,469 in Saugus between 1969 and 1977. Table 4, which compares per-capita income in Saugus to that of surrounding communities shows Saugus slightly above the average in rate of growth. Actual per-capita income in Saugus, however, is below the area average.

TABLE 4 - PER-CAPITA INCOME TRENDS*

TOWN	1969	1977	% CHANGE 1969-1977
Saugus	\$ 3,322	\$ 5,791	74.3
Lynn	3,071	5,437	77.0
Lynnfield	4,818	8,263	71.5
Malden	3,247	5,513	69.8
Melrose	3,799	6,326	66.5
Revere	3,229	5,403	67.3
Wakefield	3,796	6,560	72.8
AVERAGE	3,612	6,185	71.2

Source: Current Population Reports: Population Estimates and Projections, Series P-25, No.882, US Dept. of Commerce, Bureau of the Census, June 1980.

* Dollars not adjusted for inflation.

Employment in Saugus has increased in recent years, so again, when compared to its neighbors, Saugus has done better than most. As can be seen in Table 5, Saugus gained nearly 1,500 jobs between 1970 and 1978, an increase of about 28 percent. Its unemployment rate has also been lower than that of the surrounding area. As shown in Table 6, most employment increases were in the Wholesale and Retail Trade, and Transportation, Communication, and Utilities sectors, which have been expanding throughout the state. Services and Manufacturing are other employment areas that have been growing in Massachusetts. Saugus has not registered significant gains in these sectors, but they have remained stable.

The Wholesale and Retail Trade sector employs over 4700 people and accounts for nearly 70 percent of total employment in Saugus. The Service sector employs the second largest group, 688 people, and represents 10 percent of the total. The Route 1 commercial corridor provides many of the jobs in these two areas and is an important element of Saugus's economy.

TABLE 5 - SAUGUS-AREA EMPLOYMENT TRENDS

TOWN	Total Employment		Change Between 1970-80	
	1970	1978	No.	%
Saugus	5,356	6,850	+1,494	+27.9
Lynn	37,896	32,494	-5,402	-14.3
Lynnfield	1,216	2,260	+1,044	+85.9
Malden	14,548	17,303	+2,755	+18.9
Melrose	4,076	4,757	+ 681	+16.7
Revere	5,500	6,337	+ 837	+15.2
Wakefield	8,389	8,021	- 368	- 4.4
TOTAL	76,981	78,022	+1,041	+ 1.4

Source: EMPLOYMENT AND WAGES: CITIES AND TOWNS: 1967-1978,
Massachusetts Division of Employment Security, Occupation/
Industry Research Department, December 1979.

TABLE 6 - SAUGUS EMPLOYMENT

SECTOR	EMPLOYMENT		CHANGE BETWEEN 1970-78	
	1970	1978	No.	%
Agriculture	11	30	19	172.7
Construction	362	351	-11	- 3.0
Manufacturing	553	581	28	5.1
Trans./Comm./ Utilities	112	329	217	193.8
Wholesale and Retail Trade	3564	4751	1187	33.3
Finance, Insur- ance, Real Es- tate	64	121	57	89.1
Services	688	688	-0-	-0-
TOTAL	5354	6851	1497	30.0

Source: EMPLOYMENT AND WAGES: CITIES AND TOWNS: 1967-1978,
Massachusetts Division of Employment Security, Occupation/
Industry Research Department, December 1979.

These population, per-capita income, and employment statistics show that Saugus's economy has been stable in recent years and, in fact, is stronger than that of many nearby towns. While population is projected to remain at current levels, rising per-capita income, housing-unit, and employment levels suggest that there are ample growing markets to tap. When discussing improvement strategies for Clifftondale Square, Saugus's major community shopping area, it is important to note these trends.

B. COMMERCIAL MIX

According to the US Bureau of the Census, which tracks business trends by community, retail sales between 1972 and 1977 (adjusted for inflation) were up in Saugus by 15.2 percent, or more than \$36 million. The number of establishments, however, decreased by 6 percent. This reflects the trend to merchandising on a larger scale. Many smaller stores have been forced out of business in recent years by such larger competitors as discount department stores and supermarkets. Thus sales levels in communities like

Saugus have risen while the actual number of establishments has fallen.

The reverse of this has been true in the Services sector. Census data for service establishments in Saugus between 1972 and 1977 show gross receipts declining and the number of establishments increasing. While 25 percent more service establishments were operating in 1977 than in 1972, business receipts in 1977 were 26 percent less than the 1972 total. Unlike the Retail Trade sector, the Services sector has not been expanding.

TABLE 7: RETAIL TRENDS IN SAUGUS 1972-77

Business Group	Change in Number	Change in sales (\$1000)*	% change in sales
Hardware	-2	+ 709	+16.1
General Merchandise	-2	+ 2,692	+32.6
Food and Liquor	0	+11,930	+28.1
Automotive	-3	+ 6,966	+29.1
Gas	-6	+ 292	+ 2.9
Apparel and Accessories	+6	+ 2,963	+31.9
Furniture and Appliances	+2	- 3,135	-40.0
Eating and Drinking	+4	+12,864	+33.0
Drugs	+1	+ 1,800	+66.5
Miscellaneous Retail ¹	-14	- 473	-27.6
TOTAL	-14	+36,608	+15.2

* All dollars adjusted for inflation, that is, are all equal.

1. "Miscellaneous Retail" includes retail establishments not elsewhere classified, such as sporting goods, book and stationery stores, florists, and jewelers.

Source: US Census of Retail Trade, Bureau of the Census, Washington, DC (1972 and 1977).

TABLE 8 - SERVICE TRENDS IN SAUGUS*

Business Group	1972	1977	Change Between 1972-1977	
			No.	%
Hotels, Motels, Camps				
Number	10	10	0	0
Receipts (\$1000)	\$ 1,287	\$ 1,112	- 175	-13.6
Automotive				
Number	17	23	+ 6	+35.3
Receipts (\$1000)	\$ 4,791	\$ 3,398	-1,393	-29.0
Miscellaneous Repair				
Number	10	17	+ 7	+70.0
Receipts (\$1000)	\$ 2,788	\$ 1,340	-1,448	-51.9
Amusement Recreation				
Number	9	26	+ 17	+189.0
Receipts (\$1000)	\$ 3,495	\$ 1,961	-1,534	-43.9
Legal Services				
Number	10	15	+ 5	+50.0
Receipts (\$1000)	\$ 633	\$ 568	- 65	-10.3
TOTAL				
Number	150	187	+ 37	+25.0
Receipts (\$1000)	\$16,991	\$12,475	-4,516	-26.6

* All dollars adjusted for inflation.

Source: Census of Service Industries, Bureau of the Census,
Washington DC (1972 & 1977).

The Census does not provide specific information on individual commercial centers within a community. MAPC therefore surveyed local businesses in Clifftondale Square to establish a current inventory of commercial uses. Results show that approximately 9 percent of all retail establishments and 17 percent of all service establishments in Saugus are in Clifftondale Square.

Table 9 presents a breakdown of the businesses surveyed. As can be seen, there are many more service establishments than retailers in Clifftondale Square, a common feature of many older commercial centers in this region. When examining a market area it is important to consider retail mix, that is, the number and types of

businesses which make up a commercial district. Much of the marketing success of the larger shopping malls can be attributed to their ability to offer a complementary mix of goods and services. Such a mix not only enables and encourages "one-stop shopping" but also attracts customers from a large trade area. Local business districts, which contain a variety of goods and services, also attract a more diverse and thus larger group of patrons from their trade areas. Business districts with an uneven mix of goods have less marketing potential.

While the many service establishments in Clifftondale Square lend economic stability to the area, too high a concentration will make the overall shopping environment less attractive to the consumer. Both business and shopper surveys indicated that despite a fairly good retail mix, the number and variety of goods and services offered in the Square could still be improved. Services and suppliers which do not rely on window displays for business promotion should be encouraged to locate in less-visible spaces or be carefully interspersed with retailers. Storefronts facing the Square and along Lincoln Avenue are the areas to concentrate a variety of retailers which, combined, will create more a interesting shopping environment.

TABLE 9 - INVENTORY OF COMMERCIAL USES: CLIFTONDALE SQUARE

CATEGORY	NUMBER OF BUSINESSES	PERCENT OF TOTAL
<u>Retail</u>		
Apparel/Accessories	2	4%
Drug Stores	2	4%
Hardware/Building Supplies	2	4%
Furniture/Appliances	0	0
Food and Liquor	3	6%
General Merchandise ¹	1	2%
Eating and Drinking	2	4%
Miscellaneous Retail ²	7	14%
Subtotal	19	38%
<u>Services</u>		
Automotive	4	8%
Personal Services ³	9	18%
Professional Services ⁴	16	32%
Amusement Services ⁵	2	4%
Hotel/Motel	0	0
Subtotal	31	62%
TOTAL	50	100%

1. "General Merchandise" includes retail stores that sell a number of lines of merchandise such as dry goods, apparel, furniture, hardware, and food. Department stores are included.
2. "Miscellaneous Retail" includes retail establishments not elsewhere classified, such as drugs, sporting goods, book and stationery stores, florists, and jewelers.
3. "Personal Services" includes establishments engaged in providing services for a person or his apparel, such as beauty and barber shops, dry cleaning and laundries.
4. "Professional Services" includes establishments providing services to businesses or individuals on a fee or contract basis, such as doctors, lawyers, and finance and insurance brokers.
5. "Amusement Services" includes establishments engaged in providing amusement, recreation, or entertainment on payment of a fee, except for movie-houses.

C. BUSINESS-SURVEY RESULTS

The business survey of Clifftondale Square was done to gather information on rents, floor space, peak-activity periods, etc. Survey results identify the Square's principle assets and problems from the businessperson's perspective. The survey was given to all businesses in the project area, retail and service establishments alike. Approximately 63 percent completed and returned the questionnaire.

Survey results indicate that the business climate in the Square has been relatively stable. Approximately 60 percent of the respondents have been in operation for more than 10 years and 48 percent for more than 20 years. Over 55 percent of those polled reported no plans to change either location or scope of services, although 7 percent planned to expand within Clifftondale Square and another 30 percent were planning interior or exterior renovations. Sales trends varied, with 58 percent reporting sales up by an average of 17 percent, 35 percent reporting constant sales, and 7 percent reporting sales down. The large percentage of businesses reporting constant or growing sales and the many reporting plans to improve their businesses show that Clifftondale Square is a healthy Center. Significantly, no respondents planned on moving out of the Square.

The results also show that Clifftondale Square contains mostly small- and medium-sized independent businesses. Sizes ranged from 150 to 9000 square feet; 1500 square feet was the median size reported. 65 percent of businesses said they rented space, and the average rent was \$6.10 per square foot.

According to businesspeople, the typical shopper is more often female than male, and 76 percent are Saugus residents. Peak-shopping and business periods occurred from Thursday through Saturday and on Monday.

The average Clifftondale Square business has five full-time and two part-time employees. Survey results show that businesses provide approximately 108 spaces for employee parking. Approximately 17 percent, or 29 employees, must park on-street, however.

Businesses reported that Clifftondale Square's convenient location was its greatest asset. The variety of goods and services offered, community atmosphere, and location in a heavily populated area were also noted as positive characteristics.

When asked for recommendations to improve the Square, the majority of businesses (60 percent) listed better parking facilities and parking-law enforcement. Other suggestions included relocating MBTA bus stops, creating a one-way street system, storefront renovations, greater store variety, and improved appearance and maintenance in the Square.

D. SHOPPER-SURVEY RESULTS

To identify the key assets and problems of Clifftondale Square, shopper surveys were left at 14 locations in the Square for two weeks. More than 100 people completed the survey during that period. As a counterpart to the business survey, the shoppers' study identified the characteristics and asked for the suggestions of people using the Square. Patrons were asked specific questions about themselves, their use of the Square, and their spending habits.

The results show that Clifftondale Square, like most older town centers, is visited mostly by convenience shoppers. High-percentage activities included banking, going to the post office, purchasing food, cards, clothing, drugs, and health aids, and going to the beauty or barber shop. With the exception of clothing, which is a comparison-shopping item, these are all convenience goods and services. Indeed, nearly two-thirds of the respondents said that convenience was the major reason they came to Clifftondale Square. Another 21 percent came for the specific stores and just over 10 percent came because of the available services. There were some signs that Clifftondale Square competes as a comparison-shopping district; 8 percent of shoppers reported that they were in the Square to buy clothing. The Square also has a general merchandise store and hardware stores which carry "comparison" goods.

The results also showed that shoppers made frequent short trips to the Square. 83 percent reported coming to the Square once or more a week, with over 40 percent claiming daily trips. More than 70 percent of those interviewed reported that their average shopping trip was under one hour. Over half remained in the Square for less than 30 minutes.

Saugus residents make up the large majority (81 percent) of shoppers in Cliftdale Square; 26 percent actually live close to or in the Square. The remaining 19 percent live in the surrounding communities, with the largest numbers coming from Lynn and Revere. Further information yields the following picture:

- 80 percent came to the Square by car, while 15 percent walked;
- approximately 56 percent of those responding were female;
- the majority of shoppers reported spending under \$10 per trip.

Survey results revealed that Cliftdale Square's strongest competitors for convenience shopping are elsewhere in Saugus. Nearly 59 percent of those surveyed shopped elsewhere in Saugus for convenience items, with 20 percent going to Revere, Lynn and Melrose. The results for comparison shopping are similar. 52 percent shopped elsewhere in Saugus for comparison goods. Shopping malls in Danvers and Peabody drew the next-largest percentage of Cliftdale Square patrons.

Of those shoppers with suggestions for new goods and services, 26 percent expressed a desire for an additional restaurant. Another 22 percent wanted more clothing stores and 15 percent would like a shoe store added. The need for a supermarket was also expressed by 11 percent of the respondents.

Parking was listed most frequently by shoppers as Cliftdale Square's major problem. Traffic problems ranked second and lack of store variety was third. Suggestions for improvements mirror these results: 32 percent of shoppers suggested more and better parking, 20 percent would like to see traffic improved, and 11 percent saw a need for greater store variety. Storefront improvements and other measures to improve the appearance of the Square also were noted often. While most shoppers (52 percent) reported that conditions had not changed markedly in the Square over the past three years, a sizable 44 percent believed that the quality of the Square had actually improved. Only 4 percent perceived a decline in quality.



PARKING & TRAFFIC

III. PARKING AND TRAFFIC

A. PARKING ANALYSIS

The local project committee and business and shopper surveys identified the inadequacy of the number of parking spaces as one of the problems affecting business activities in Clifftondale Square. Since it is an older commercial center, Clifftondale's parking supply is affected by narrow streets, which hinder on-street parking, and dense development, which limits possibilities for off-street facilities. At the same time, the Square is a major shopping center for townspeople, and shoppers expect convenient and adequate parking.

In response to this, a number of efforts were undertaken to understand the Square's parking needs and how well existing supplies satisfy those needs. First, a parking inventory was conducted to establish the number, location, restrictions on, and accessibility of spaces in the Square. Second, criteria matching parking requirements to the amount of floor space for various businesses were used to determine the demand for parking. Third, a parking-duration study was conducted to determine the level of use and length of stay for the spaces in the Square. The results of these three analyses offer a clear view of Clifftondale Square's parking characteristics, from which solutions can be developed.

1. Parking Inventory

Tables 10 and 11 describe the on-street and off-street parking supply for four areas in Clifftondale Square. Illustrated by Map B, the areas have been defined to identify parking spaces which can be expected to serve different portions of the business community in the Square. The area boundaries reflect the limitations of traffic barriers and reasonable walking distances.

A total of 360 spaces are available to serve customer, merchant and employee needs. Of these 360, 97 are available on-street, the remaining 263 off-street.

The parking inventory has identified several problems with the existing supply:

- The two-hour restriction for on-street parking, especially on Lincoln Avenue, allows longer parking than would be reasonable for on-street convenience users.
- There are no municipally controlled off-street parking spaces. The town maintains the church lot in exchange for residents' use. All other off-street spaces are privately maintained by individual businesses.
- Area D, the church lot on Jackson Street, is used almost exclusively by commuters and post-office employees. Poor access between the lot and shopping areas limits this site's use as a parking lot for the business community.
- Area C is the major shopping section of the Square and has the highest number of on-street and off-street spaces. Walking distances and the rotary effectively isolate this area from parking supplies in either Area A or B.

TABLE 10: PARKING INVENTORY, ON-STREET
AREA A

LOCATION	NUMBER OF SPACES	RESTRICTIONS	COMMENTS
Essex St. from Flaag Rd. to Jackson	11	2hr. limit	7 angled
Jackson-North from Lincoln Ave. to opposite church lot	11	2hr. limit	7 driveways, no parking at corner of Jackson and Lincoln 1 crosswalk

AREA B

Essex Street	4	2hr. limit	--
Lincoln St. - North from rotary to funeral home	10	2hr. limit	4 driveways T stop 1 crosswalk
Lincoln St. - South from auto parts and antiques	5	2hr. limit	1 cross street 2 driveways 1 T stop

AREA C

Lincoln St. - South from clothing store to Charlotte Rd.	23	2hr. limit	2 cross streets 6 driveways 1 T stop 4 crosswalks
Lincoln St. - North from church to Oak Hill Rd.	21	2hr. limit	6 driveways 4 crosswalks
Smith Road	5	2hr. limit	3 marked spaces
Ernest Street	7	2hr. limit	unmarked

TABLE 11: PARKING INVENTORY, OFF-STREET

LOCATION	LAND USE	AREA A		
		CAPACITY	ACCESS	COMMENTS
Rear of 1-23 Essex Street	Conv. market, professional services, phar- macy	22 spaces	Jackson St.	unmarked
Rear of 45- 59 Jackson Street	Barber, jewelers, RE, attorney	13	Jackson St.	marked
43 Jackson Street	Hair stylist, dance school	5	Jackson St.	unmarked
AREA B				
Rear of 544	Attorneys	16	Lincoln Ave., Lincoln Ct.	marked
Rear of 552 Lincoln	Antiques	8	Lincoln Ave.	unmarked
Rear of 549 Lincoln	Funeral parlor	17	Lincoln Ave., Myrtle St.	marked
Side of 539 Lincoln Ave.	Hair stylist. professional offices	12	Lincoln Ave., Myrtle St.	unmarked
AREA C				
Between church and 44 Jackson	Employee parking	15	Jackson St.	marked
Rear 489 Lincoln Ave.	Bank	10	Lincoln Ave.	marked
Rear or 508 Lincoln Ave.	Clothing store	13	Smith Road	marked
Side of 487 Lincoln Ave.	Discount drugs	14	Lincoln Ave., Jackson St.	marked

(continued on following page)

TABLE 11 (continued)

LOCATION	LAND USE	CAPACITY	ACCESS	COMMENTS
Rear of 466 Lincoln Ave.	Bank	18	Ernest St.	marked
Rear of 448 Lincoln	Credit Union	7	Ernest St.	unmarked
<u>AREA D</u>				
Jackson St.	Church, PO employees, commuters	93	Jackson St.	marked

2. Parking Demand

To determine the adequacy of the parking supply for the Square, criteria based on the number of spaces needed per square foot of commercial space for various businesses were applied to areas A, B, & C. The criteria used are standard criteria adjusted for characteristics present in Clifftondale. (Unmodified standard criteria do not adequately reflect the short-trip, convenience-shopping nature of the Square.) Table 12 lists them.

The demand estimated for each area was compared with the inventory of supply to determine if a surplus or lack of spaces exists. Table 13 summarizes the results of the comparison. The only area in Clifftondale Square with too few spaces is Area C, and vacant, divided parcels behind businesses on Lincoln Avenue could provide additional off-street spaces.

TABLE 12: PARKING CRITERIA

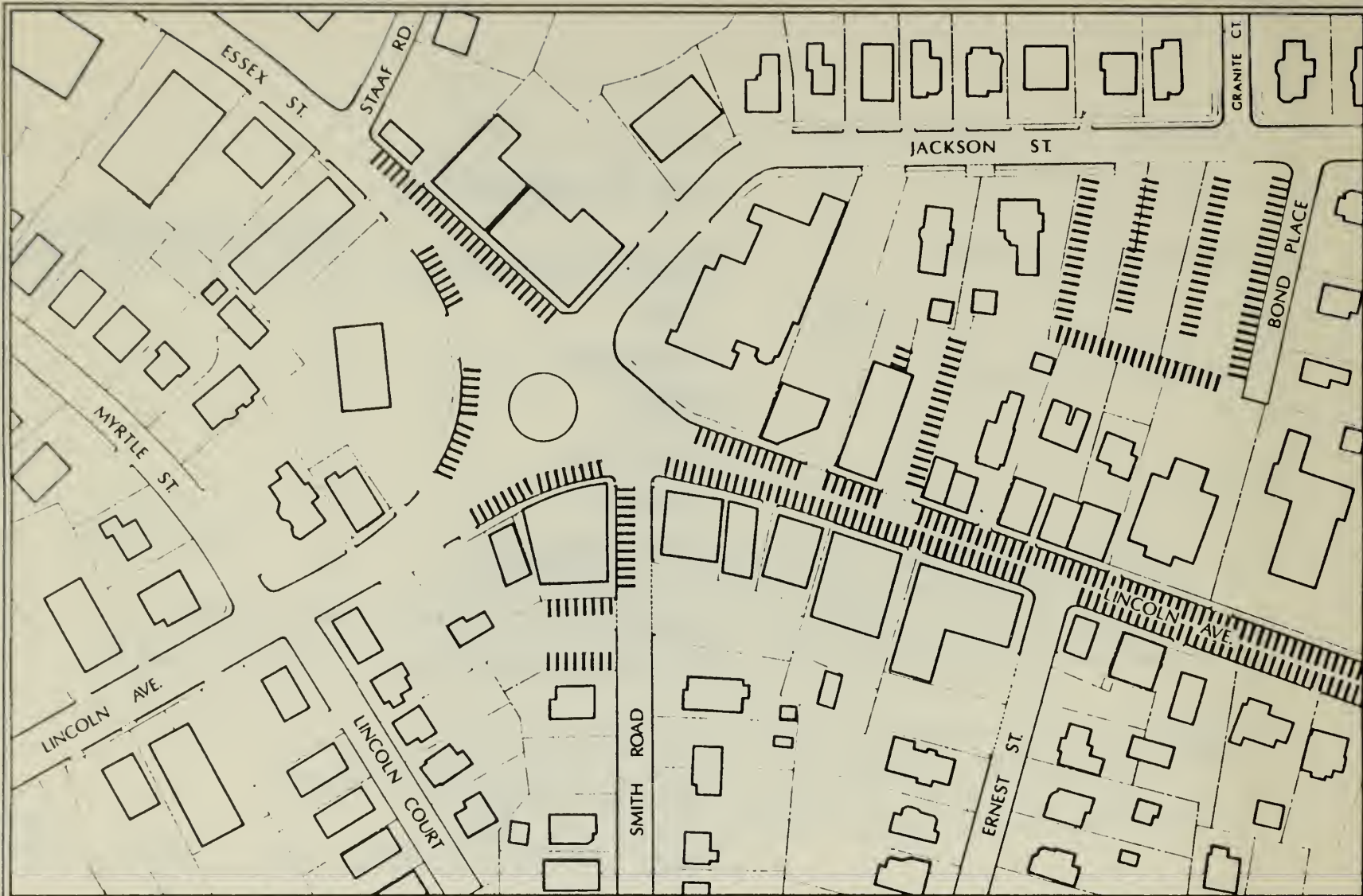
TYPE OF BUSINESS	MODIFIED* PARKING CRITERIA (spaces per 1000 Square Feet)
RETAIL	4.0
PROFESSIONAL	3.5
SERVICE	4.0
BANK/OFFICE	3.5
RESTAURANT	5.0
OTHER: RECREATION ENTERTAINMENT	4.0

* Adjusted for Clifftondale's characteristics:

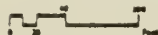
1. short duration of trips; 2. convenience shopping.

TABLE 13: SUPPLY/DEMAND COMPARISONS

AREA	SUPPLY		TOTAL	DEMAND	SURPLUS OR (DEFICIENCY)
	ON-STREET	OFF-STREET			
A	22	40	62	56	6
B.	19	53	72	52	20
C	56	77	133	171	(38)



MAP C



CLIFTONDALE SQUARE REVITALIZATION PROJECT

Town of Saugus, Massachusetts

PARKING SPACES SURVEYED

Scale: 1" = 50' 11"
 Saugus is shown on Map 11-10
 Saugus Engineering (Inc)
 100 Main St., Saugus, MA 01906
 PREPARED BY: SAUGUS ENGINEERING (INC)
 MAP & THE TOWN OF SAUGUS
 PREPARED BY: SAUGUS ENGINEERING (INC)
 MAP & THE TOWN OF SAUGUS
 Map completed: December 1981

This map has been prepared for planning purposes only.
 A greater degree of accuracy is required for engineering documents.

3. Parking Characteristics

A limited parking-duration analysis was conducted, centering on the Lincoln Avenue commercial area (Area C). This analysis is designed to yield information on the duration, turnover, accumulation, and space utilization of the area studied. Parked cars in 65 on-street and 120 off-street spaces (see Map C) were identified by vehicle registration number and recorded every fifteen minutes.

Table 14 summarizes the information collected for the Lincoln Avenue commercial area's primary spaces. The analysis identifies several problems within this area:

- Utilization of the primary spaces is very high (82.5 percent). A level of 80 percent is generally accepted as saturated.
- Average duration is 25 minutes, with 87 percent parked for 30 minutes or less.
- Peak accumulation occurred at 10:15 a.m. with 106 percent of the available primary spaces occupied. (Greater than 100% use occurs when illegal spaces are also occupied)
- Primary convenience spaces are being occupied by long-term parkers (one hour or more) owing to the shortage of off-street spaces within the area.

TABLE 14: ON-STREET PARKING CHARACTERISTICS
34 PRIMARY SPACES 9:00 a.m. - 1:00 p.m.

Duration	Number of Parked Cars	Percent of Total	Space Hours	Percent of Space Hours
15 min.	194	71.8	48.5	43.2
30	41	15.2	20.5	18.3
45	15	5.5	11.25	10.0
1 hr. 00 min.	10	3.7	10.0	8.9
15	4	1.4	5.0	4.5
30	1	.4	1.5	1.3
45	1	.4	1.75	1.6
2 hrs. 00 min.	1	.4	2.00	1.8
15	0	0	0	0
30	0	0	0	0
45	0	0	0	0
3 hrs. 00 min.	0	0	0	0
15	0	0	0	0
30	0	0	0	0
45	1	.4	3.75	3.3
4 hrs. 00 min.	2	.8	8.00	7.1
TOTALS	270	100	112.25	100
Average duration			25 minutes	
Turnover (4 hr.)			8 cars/space	
8 hr. turnover (expanded)			16 cars/space	
Utilization of space			82.5%	
Peak accumulation			36 cars (106% of supply) at 10:15 a.m.	

4. Evaluation

The supply, demand, and duration survey portrays much of Clifftondale Square as benefiting from a good supply of on- and off-street parking spaces. The one area that currently suffers a shortage of spaces is Lincoln Avenue. This primary commercial area could be improved through the creation of new off-street spaces and the changing of the current two-hour parking limit on-street to a one-hour limit.

The supply/demand comparison indicated a shortage of 38 spaces in the Lincoln Avenue area. The duration analysis further refines this by identifying a need for moderate- to long-term off-street facilities. Long-term (one-hour or more) parkers are blocking the primary convenience spaces on-street. Construction of new off-street spaces will provide alternatives to on-street parking for those wishing to park longer. A one-hour limitation for on-street parking will also encourage turnover and maximum use of the Lincoln Avenue spaces.

B. TRAFFIC ANALYSIS

A limited traffic analysis was conducted in an effort to understand the volume and circulation characteristics of the Clifftondale Square rotary. Turning movements and traffic volumes were recorded during the peak-hour period of an average day, and circulation-pattern observations were made on several days at varying times. Map D illustrates the estimated average daily total (ADT) volumes for the four streets that intersect at Clifftondale Square. Map E illustrates the peak-hour volumes and turning movements around the rotary at the busiest hour.

Of particular interest are the volumes carried on Lincoln Avenue, Essex, and Jackson Streets, and the width of Lincoln Avenue north of the rotary.

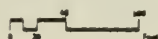
1. Evaluation

Narrow streets, high volumes, and the variety of turning movements combine in Clifftondale Square to create a feeling of crowded, confused streets. In fact, traffic flows fairly evenly and without major delay except in a limited number of situations. The most severe tie-ups occur when rush-hour traffic and the MBTA buses converge on the rotary. At times, two buses traveling in opposite directions on the northern leg of Lincoln Avenue effectively block the traffic in both directions when dropping off passengers. This is due to the location of the bus stops and the driver's inability to pull over out of the travel lanes (frequently because of illegally parked cars). Consideration should be given to relocating one of the bus stops so they are not directly across the street from each other.

The high volumes of traffic present on Lincoln Avenue, Essex, and Jackson Streets also present an alternative for changes in circulation. Estimated ADTs based on peak-hour counts indicate



MAP D



CLIFTONDALE SQUARE REVITALIZATION PROJECT

Town of Saugus, Massachusetts

AVERAGE DAILY TOTAL VOLUMES

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A greater degree of accuracy is required for engineering documents.

W. B. B. B.
Saugus Planning Board
Saugus Engineering Firm
for the
Saugus Planning Board
PREPARED BY
W. B. B. B.
Saugus Planning Board
PREPARED BY
Saugus Planning Board
Map completed December 1981



MAP E

CLIFTONDALE SQUARE REVITALIZATION PROJECT

Town of Saugus, Massachusetts

PEAK HOUR VOLUMES: TURNING MOVEMENTS

MADE BY
Saugus Planning Dept. 1982
Saugus Engineering 1982
by David 1982
MAPS: David 1982
PREPARED BY
MAPS & The Town of Saugus
DESIGNED BY
1. Saugus
Map: 11/19/82 11/19/82

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A greater degree of accuracy is required for engineering documents.

that traffic volumes meet the warrants necessary to install traffic signals. However, the Committee does not want to consider signalization of the intersection at this time.

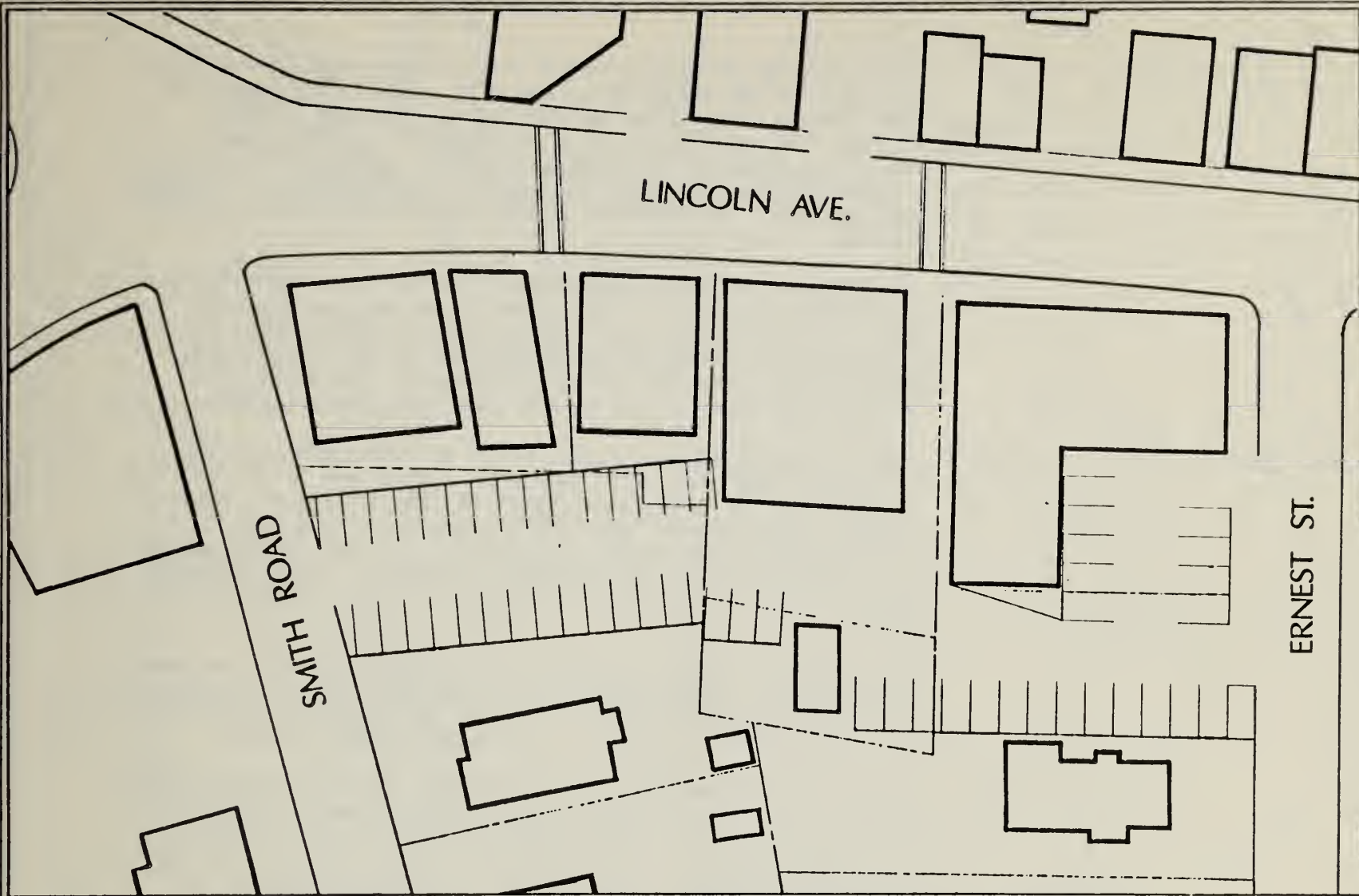
C. PARKING AND TRAFFIC
RECOMMENDATIONS

1. Parking

The parking analysis indicates a shortage of spaces in the Lincoln Avenue area. To respond to this, a new lot is proposed for the vacant parcels behind several stores. Although used occasionally by some residents and shoppers, these unimproved areas should be developed into a municipal lot for use by the whole area. This lot, illustrated by Map F, would run between Smith Road and Ernest Street, connecting to an existing lot behind the Saugus Bank and Trust Company. Providing a total of 35 spaces, the lot would decrease the deficiency of spaces in this area from 38 to 3. The proposed layout was chosen by the committee because of its ability to meet the parking need of the area without encroaching on residential property.

The proposed lot has four access points. The entrances on Smith Road and Ernest Street provide a through route for vehicles. However, several factors combine to make a one-way flow from Smith Road to Ernest Street desirable. The narrowness of the lot is not ideal for regular two-way traffic. In addition, it would be undesirable to increase the volumes of traffic traveling into the rotary from Smith Road. Thus, while Ernest Street, the bank lot, and Smith Road could remain two-way, it is recommended that a one-way flow within the lot be encouraged from the Smith Road entrance toward Ernest Street. It is also recommended that no left turns be allowed when leaving Smith Road, further controlling the volumes of traffic entering the rotary.

Two other major access points are the proposed pedestrian routes. Design proposals are recommended (in another section) to improve the alleyways between the Saugus Bank & Trust and the Oddfellows' Hall and between the hardware store and the Tumble Inn Restaurant. These pedestrian walkways provide a link between the lot and Lincoln Avenue. Combined with relocated crosswalks, a system of clear, safe pedestrian ways will be provided throughout the area.



MAP F



CLIFTONDALE SQUARE REVITALIZATION PROJECT

Town of Saugus, Massachusetts

PROPOSED PARKING LOT

MADE BY
 Town of Saugus, Mass. Dept.
 Planning & Engineering Dept.
 100 Main St., 2nd Fl.
 SAUGUS, MASS. 01906
 PREPARED FOR
 SAUGUS & The Board of Selectmen
 PREPARED BY
 J. J. J. J.
 Map scaled to original 1:1

This map has been prepared for planning purposes only.
 A greater degree of accuracy is required for engineering documents.

The relocation of Lincoln Avenue crosswalks to correspond with the proposed lot and pedestrian alleys will allow for the relocation and addition of on-street parking spaces. Although specific designs have not been developed, preliminary results suggest that two or three new on-street spaces could be included. It is recommended that the Lincoln Avenue on-street parking be realigned and repainted, in accordance with the new crosswalks and pedestrian system.

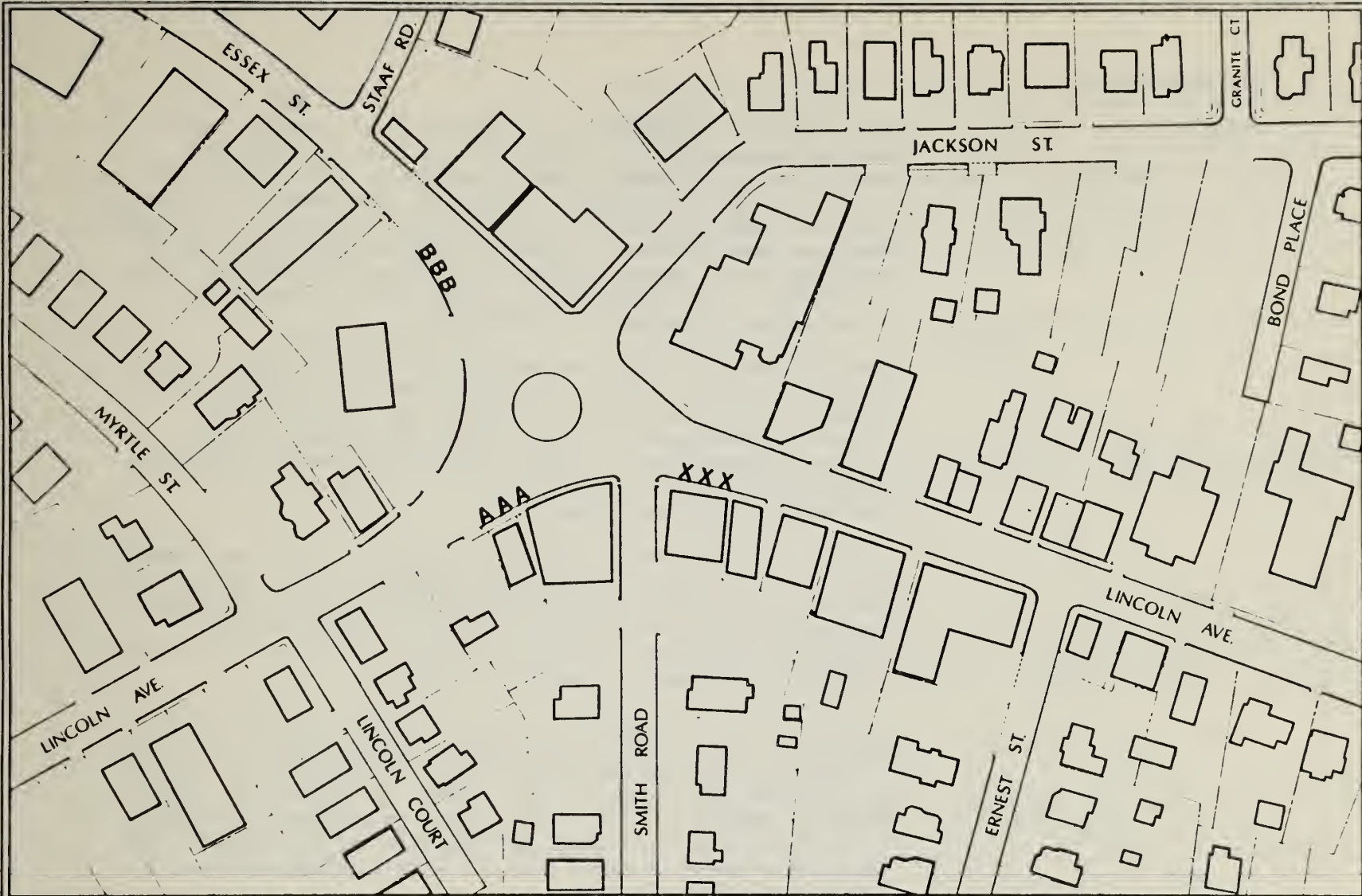
The proposed lot covers approximately 16,000 square feet including pedestrian ways. Four property owners are involved requiring negotiations for access and parking areas. Construction-cost estimates total approximately \$25,000 but do not include land-acquisition costs, lighting, or landscaping. The majority of the landscaping will occur in and around the pedestrian alleys.

2. Traffic

The major problem cited in the traffic analysis centers on the location of the MBTA bus stops. Relocation of one of the bus stops, currently at the rotary entrance on the northern leg of Lincoln Avenue, would alleviate some of the congestion. The Council recommends that the bus stop in front of the news store be removed and two replacement stops be created elsewhere. Two replacements are necessary because two bus routes currently share the existing stop.

Map G indicates the current stop and the proposed ones. The stop of express bus (#426) should be relocated south on Lincoln Avenue to the entrance of the rotary. That of the local bus (#430) should be moved across the rotary to the entrance of Essex Street.

Several parking spaces will be affected by the bus-stop relocations. Those lost on Essex Street could be regained through the elimination of the center access point to the gas station on the corner of Essex and Lincoln. If this center access is eliminated, it would also reduce the number of approaches into the rotary. The two spaces lost on Lincoln Avenue at the new stop site can be regained at the old site.



MAP G



This map has been prepared for planning purposes only.
A graphic display of accurate information is not intended.

CLIFTONDALE SQUARE REVITALIZATION PROJECT

Town of Saugus, Massachusetts

BUS STOP LOCATIONS

- XXX **Current Bus Stop**
- BBB **Relocated Local Bus**
- AAA **Relocated Express Bus**

MADE BY
Saugus Planning Dept. 1984
Saugus Engineering Dept.
for Planning Dept.
MADE FOR THE TOWN OF SAUGUS
PREPARED BY
Saugus Planning Dept. 1984

D. IMPLEMENTATION

1. Parking

Implementation of the parking-lot proposal will require cooperation and negotiations on the part of the town, the property owners, and the Clifftondale Square merchants. The lot could be developed under town control, as a public improvement, or privately by a consortium of businesses. Regardless of who acts as the primary developer, use and access agreements must be negotiated with the current property owners. Whether through outright sale or leasing agreements, a single developable parcel should be agreed upon before construction funds are sought.

When considering actual construction, in addition to the lot costs, public-improvement costs for existing streets, sidewalks, and drainage systems should be considered. The proposed layout recommends realigned on-street parking and crosswalks. With design recommendations, a complete package of public improvements could be formed to draw on such funding sources as Community Development Block Grant Funds.

Special attention should be given to the costs of drainage improvements. The existing storm-drain system along Lincoln Avenue is inadequate and flooding occurs at some points already. The present drainage system between Ernest St. and the rotary may need replacement. Options for including these improvements in a funding proposal for the new lot should be explored.

A major source of funding for off-street parking is keyed to the Commercial Area Revitalization District (CARD) process. The town of Saugus should complete an application in an effort to have Clifftondale Square designated as a CARD. The application process combines land-use and economic and business-activity information to design a strategy to deal with commercial-area problems. More information can be obtained from the State's Executive Office of Communities and Development.

Traffic and parking controls - such as the left turn restriction on Smith Road, and the one hour parking limit on Lincoln Ave. - are the responsibility of the town. These controls could be achieved through the placement of signs. Local groups like the Clifftondale Merchants Association should present the proposal to the Board of Selectmen.

2. Traffic

Relocation of the MBTA stops can be accomplished through established procedure. The proposed changes must be sent to the MBTA by the Saugus board of selectmen. Both the MBTA and the board study the proposals -- the Board through public hearings, and notification of the abutters -- and determine whether to approve them. The MBTA makes recommendations to the board and will not relocate the stops unless the board supports the changes in writing. Further information can be obtained by contacting the MBTA's Operations Office.

3. Funding Assistance

Following are ways in which construction of the proposed lot and public improvements can be financed:

a. Private - Conventional Financing

Conventional loans typically are available for a parking lot undertaken as a private enterprise. But public improvements - to crosswalks, on-street parking, and drainage systems - would require public financing.

b. State - Off-Street Parking Program

This program provides matching funds (70/30-state/local) for the construction of off-street parking facilities within CARDS*. On-street parking and drainage improvements would not be covered. Towns with CARDS must apply for funding to the state Executive Office of Administration and Finance.

c. State - Community Development Block Grants (CDBGs)

The town of Saugus can apply for CDBG funds for a variety of community projects including downtown revitalization. Specific activities that are eligible include property acquisition, improvement and disposition; rehabilitation loans, grants, or interest write-downs; public improvements to leverage private investment; and business-development assistance. Applications must be made by the town to the

*Commercial Area Revitalization District

Executive Office of Communities and Development (EOCD). (For further information contact the Division of Community Services, Executive Office of Communities and Development, 100 Cambridge Street, Boston, MA 02202)

d. State - Urban Systems Roadway Improvements

The town of Saugus can apply for funds for a variety of roadway improvements. Roadway reconstruction, realignment of on-street parking, sidewalk improvements, street lighting, and signage are all eligible for funding. Local funds must be used for plans and engineering. Applications must be made by the town to the Massachusetts Department of Public Works, Urban Systems Coordinator.



DESIGN

IV. DESIGN

A. OVERVIEW

Clifftondale Square developed as a commercial center at the turn of the century. Several buildings in the Square date back to the early 1900s, when horse-drawn carriages and trolleys brought passengers and trade through Clifftondale, making it one of Saugus's earliest centers of commerce. Today, MBTA buses and cars fill the Square and it continues to be a busy area.

Like economic, parking, and traffic considerations, the physical appearance, or design, of a commercial area is critical to its success. Clifftondale Square, with its many older buildings and well-kept newer structures, is fortunate to have maintained the character and appeal of a community shopping center. Businesses in the Square offer personal service and a variety of goods. Features such as these - historic buildings, personal service, and a good retail mix - can be marketing assets in a well-designed downtown. As discussed, plentiful and accessible parking is one design element that is critical to economic success; equally important is overall appearance. Storefronts, signs, window displays, and landscaping all should provide clues to potential customers that Clifftondale Square will be an interesting and worthwhile place to shop.

1. Problems and Opportunities

Several problems in the Square have been identified already:

- Business- and shopper-survey results showed that while most businesses in Clifftondale Square are stable, local merchants are faced with increasingly stiff competition from nearby malls. An improved retail mix and better overall design are two ways to offset this problem.
- Congested streets and lack of parking also were cited as serious concerns by merchants and shoppers. As discussed, the addition of a parking lot in the Square and the relocation of MBTA stops would alleviate these problems.
- The need for additional pedestrian ways has been identified and suggestions made for the location of new pathways.

MAPC's analysis of design in Clifftondale Square has identified other problems:

- Storefronts and signs, two key design elements, must be changed to improve the overall appearance of the Square.
- Better sidewalks, crosswalks, street furniture, and landscaping are the kinds of pedestrian amenities that would make the Square a more comfortable place to shop.
- Clifftondale Square lacks open spaces that are accessible to the public.

2. Design Benefits

Businesses, property owners, and shoppers all benefit from Clifftondale Square and control and influence its appearance. Design improvements, therefore, must be initiated by and beneficial to these groups. From a businessman's perspective, attractive storefronts and effective signs have high advertising value. Time and money spent on good-quality design are returned through increased sales and a more competitive market position. For property owners, well-maintained buildings have fewer vacancies and can demand higher rents. Design can increase property values and, under the recently enacted Economic Recovery Act¹, owners of older buildings who renovate them can take advantage of substantial

1. The Economic Recovery Act of 1981. See appendix for details.

tax credits. For the community, the improved design of an older commercial district is a way both to preserve local history and to build support for community businesses.

Organizing and coordinating design in an older downtown is often difficult. A well-written bylaw can be an effective influence on design. Saugus is fortunate to have a good sign bylaw¹. Another means of influencing design is the adoption of guidelines that outline what to look for in design decisions. Such guidelines can be used by local merchants and property owners making storefront or building improvements. Lack of information about design and how individual storefronts relate to the buildings they are part of and those beside them, result in poor overall design.

B. DESIGN ANALYSIS

1. Storefronts and Signs

a. Storefronts

Clifftondale Square contains commercial buildings of many shapes, sizes, colors, and styles. Variety makes a commercial area look interesting but can also make it look chaotic if attention is not paid to the overall design of the downtown. To coordinate the different styles of old and new buildings, it is important to concentrate on street-level design. Signs, materials, colors, and choice of accessories on storefronts can unify a streetscape. Buildings should be maintained, equipment (like air conditioners) should be hidden from view, and window displays should be kept simple.

To create the best effect, storefront designs should be coordinated along an entire block. While storefronts and signs need not be identical on each building, a block should project an image that is identifiable and attractive. One means of unifying different building styles is with awnings. Awnings are a traditional accessory and are a functional and inexpensive means of creating continuity. They screen unattractive storefronts, add color to the streetscape, protect window displays from harsh sunlight, and provide shade. Compatible building colors and coordinated signs are other ways to unify the streetscape.

1. For details of the Saugus sign bylaw, see Zoning Bylaws of the Town of Saugus MA, Article VII: Regulation of Advertising Signs and Bill Boards, July 1, 1978.

In certain cases, the backs of buildings are important to the appearance of the downtown. If a parking lot is developed behind Lincoln Avenue between Smith Road and Ernest Street, the backs of several buildings will become visible to customers. The maintenance and appearance of these facades will therefore be more important and improvements like painting and cleaning, removing unsightly equipment, and adding new signs, should be made. Landscaping and adding or improving rear entrances also enhances a merchant's ability to attract customers.

b. Signs

Signs are one of the most important elements of a building's facade. A well-designed one attracts attention and conveys a message. Signs should be coordinated throughout the Square so that a better image of the shopping area is created. Saugus's current bylaw is sufficient to prevent the use of oversized, garish, or unsafe signs in Clifftondale Square. Violations do exist, however, and the town should enforce the bylaw more closely.

A sign should add to the appearance of a building and project a certain image. Color and scale are important when designing a sign. The degree of color contrast between the message and the background is crucial to legibility. High contrast (like black letters on a white background) is a good idea; low contrast colors, such as yellow letters on a white background, do not read as well. Different colors also project different images. A color that is very eye-catching and flashy, might be inappropriate for a bank and suitable to a five-and-dime, but in all cases, sign color should be compatible with building color.

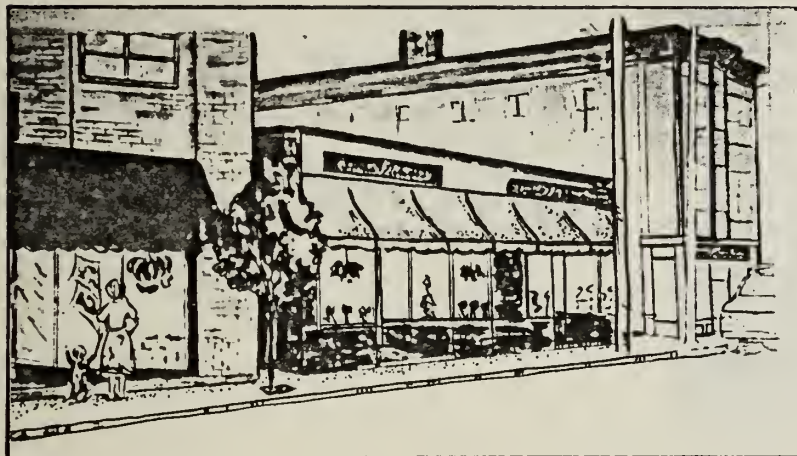
As mentioned, scale also is critical. Like color, the weight and style of lettering portray an image and should be carefully selected. A sign should always be proportional to a storefront and letter/word size should be between 1/3 and 1/2 the height of the sign area. Brand names should always be kept secondary to business identification.

The following sets of photographs and sketches illustrate ways in which storefronts and signs could be improved in Clifftondale Square.



EXISTING CONDITIONS

- Two-colored divided facade disrupts unity of building.
- Signs are incompatible with each other and overpower the storefront.
- Pedestrian amenities are lacking.



RECOMMENDATIONS

- Paint the building facade a continuous color to unify the two storefronts.
- Remove perpendicular sign.
- Replace large free-floating signs with smaller compatible signs.
- Provide awnings for shade.



EXISTING CONDITIONS

- Oversized signs are of improper scale and disrupt architectural lines.
- False peaked-roof is out of character with building style.
- Untidy window display creates confusion.
- Amenities for the pedestrian are absent.



RECOMMENDATIONS

- Replace oversized signs with smaller, compatible signs.
- Remove false roof and restore natural line of building.
- Organize window displays.
- Add an awning for shade and flower boxes for interest.

2. Pedestrian Ways and Amenities

Sidewalks, alleys, crosswalks, benches, lighting, landscaping -- these are things that make it easy or difficult, comfortable or uncomfortable, for people to shop in an older downtown. "Pedestrian ways and amenities" includes this broad range of elements, and while they are not as visible as storefronts and signs, their importance to the functional design of a downtown is great.

As noted, there is a need to improve sidewalks and alleys in Clifftondale Square. Because it is an older downtown, the sidewalks are narrow. Thus it is important to keep them free of obstacles but it makes the addition of landscaping, benches, and other amenities somewhat difficult. Trees, trash barrels, lights, public telephones, and the like should be carefully spaced along sidewalks; too many amenities in one spot creates an obstacle.

In Clifftondale, trees are already planted along the main streets, and the rotary, a central feature of the Square, is nicely landscaped. There are also plenty of trash barrels. However, the barrels are of two different designs, and in many places they stand side by side. Barrels of the same design, and more evenly spaced would make the Square more attractive and would produce the same result -- a clean commercial area.

Sidewalk cracks should be filled and sidewalks curbed so that the line between pedestrian and vehicular use is clear. In addition, crosswalks should be marked and located in areas that are both safe and convenient.

Most important, pedestrian paths should link parking to shopping areas and serve to unify the Square. In Clifftondale, the existing situation is somewhat haphazard. Pedestrian ways from the largest parking lot in the Square, the church lot, are not defined. MAPC's parking analysis shows that although most people who park there are not shoppers but commuters, they are potential customers. By upgrading the sidewalks and alleys leading to this lot, as well as the storefronts along the way, more commuters could be enticed to shop in the Square. An additional pedestrian way, leading from the church lot to the Brook's lot on Lincoln Avenue would improve pedestrian circulation and could increase the number of commuters who shop in Clifftondale Square.

Results of the parking analysis also show that most shoppers parked on-street. The desire to park as close to stores as possible is well-known to merchants and planners attempting to remedy any parking-supply problem. A parking lot off of Lincoln Avenue would certainly be close enough to stores to help alleviate Clifftondale's problem of too-few spaces but it would be hidden from view. Signs can mark the entrance, but for shoppers to perceive the lot as close, pedestrian improvements to alleys leading to the lot and to sidewalks along Smith Road will be necessary. Crosswalks at the end of alleys will also be needed. Sidewalks and alleys should be paved, landscaped, well-lit, and attractive. Given the narrowness of sidewalks along Lincoln Avenue, improved alleyways provide one of the few opportunities to add benches - a shopper amenity now missing in the Square. The sidewalks along Smith Road could also be improved to include landscaping and benches. If the parking lot is developed, it will be a large generator of pedestrian traffic, making it a key place to provide amenities.

The map on page 4 shows the location of the proposed lot, pedestrian alleys, and crosswalks. The plan and sketch on page 46 illustrate ways in which the alley between the Saugus Bank and Trust and the Odd-fellows' building could be improved.

3. Open Space and Gateways

a. Open Space

Open space is also important to the overall appearance and functioning of a commercial district. It provides visual relief in an urban setting and ideally would contain such pedestrian amenities as benches and picnic tables. It is important that open space is accessible, landscaped, and maintained.

Clifftondale Square is fortunate to have at its center two large spaces; the rotary and the yard of the Methodist Church. Both are nicely landscaped and maintained but unfortunately are not accessible to the public. While these spaces are pleasing visually, they cannot be used or enjoyed by shoppers in any other way. Given existing traffic patterns, commercial buildings, and parking lots, there are few choices for the development of open space in Clifftondale Square.

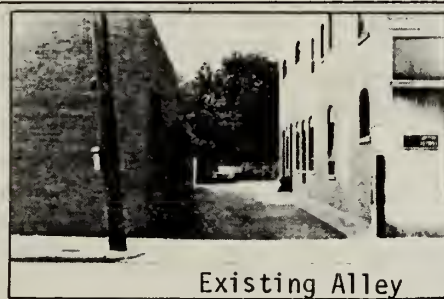
As discussed, alleyways and side streets provide the best opportunity for adding pedestrian amenities. Another suggestion is for benches to be placed in spaces created in front of the Methodist church.

Flowering shrub, ultimate height not to exceed bottom of window.

Custom-built bench of redwood or cedar, 18" height.

Flowering tree, with ivy groundcover in 36" high planter.

18" high redwood or cedar planter, filled with annual flowers.



PLAN VIEW (no scale)

PERSPECTIVE OF PROPOSED ALLEY

A jog in the fence on each side of the front entrance could provide enough room for two benches. Because the church corner overlooks the entire Square, is shaded, and contains a bus stop, it would be an ideal location for benches.

Landscaping should also be used wherever possible in Clifftondale Square to soften buildings, break large expanses of asphalt, provide shade, accentuate desirable views, and buffer unsightly areas. For example, landscaping in front of the Mobil station, an area of extensive blacktop, would make that corner more attractive. As mentioned, trees have already been planted along Lincoln and Essex streets. Additional plantings on Jackson Street would help tie this section into the main commercial area. Window boxes would also be a colorful addition to many storefronts in the Square.

b. Gateways

Tree plantings, pavings that contrast with surrounding paving in color or texture, overhead canopies, upright fixtures, and banners can be used to give definition to a town center. When placed at the edges or gateways of a downtown, such elements make people aware that they have arrived in a particular area. Handsome gateways, like clean storefronts and signs, attract customers and help identify a commercial area. Suggestions for gateway improvements in Clifftondale include: planting flowering trees to create an avenue or to mark intersections, placing power lines underground, and using special paving to define the commercial area.

C. IMPLEMENTATION

1. Storefronts and Signs

Storefront and sign improvements are the responsibility of individual business and property owners. When major building or storefront renovation is being considered (redesigning an entrance or a facade, or rehabilitating an older building) the assistance of an architect should be sought. Signs should also be designed by professionals, since they are highly visible and of great advertising value.

The Clifftondale Merchants' Association can provide design guidelines to businesses but actual improvements must be made by the individual property owner. If an awning program is undertaken, the Merchants' Association could coordinate this effort. If awnings are purchased as a group, it is sometimes possible to buy them at a discount.

If a mortgage pool is established for storefront improvements, loan approval should be subject to review based on adopted design guidelines.

2. Pedestrian Ways and Amenities

The town is responsible for major sidewalk repairs or construction and providing pedestrian amenities like lighting, benches, and waste receptacles. In Clifftondale, however, merchants have donated certain amenities like trash barrels and assisted with landscaping. Given the effects of Proposition 2½ on municipal budgets and recent federal cutbacks, pedestrian improvements suggested in this report will undoubtedly require the financial (and other) cooperation both of merchants and of town officials.

3. Open Space and Gateways

Landscaping around buildings, like storefront improvements, is the responsibility of the individual merchant or property owner. Other suggested improvements, like providing public benches in front of the Methodist church and improving landscaping along side streets, will require the joint efforts of individual property owners, the Merchants' Association, and the town.

"Gateway" improvements, like placing wires underground or adding special paving materials, are expensive and should be considered long-range objectives. These improvements are most feasible when incorporated into other major public works projects that require tearing up the existing street surface. Tree plantings, however, could be done by the Merchants' Association or the town at any time.

4. Funding Assistance

The following are ways in which downtown improvements can be financed:

a. Private - Conventional Financing

Commercial bank loans typically are available to borrowers with good credit ratings. Banks generally lend between 50 and 70 percent of the asset values. Merchants, particularly those who rent storefronts, often are reluctant to borrow money for storefront improvements at currently high rates. To alleviate this problem, the Merchants' Association could approach local banks regarding the establishment of a mortgage pool targeted at Clifftondale Square business improvements. Some reduction in the interest rate might be obtained.

b. Private - Investment Tax Credit

An Investment Tax Credit (ITC) may be deducted from the amount of taxes owed. Under the Economic Recovery Act of 1981 (effective January 1, 1982), the new ITC for qualified rehabilitation is as follows: 15 percent for non-residential structures at least 30 years old; 20 percent for non-residential structures at least 40 years old; and 25 percent for certified historic structures, residential or non-residential.

A "qualified rehabilitation" refers to any building that has been substantially rehabilitated, that is, rehabilitation expenditures exceeding the greater of either the taxpayer's adjusted basis in the property or \$5,000 within a 24-month period. The building must also have been in use prior to beginning the rehabilitation and retain at least 75 percent of the existing external walls. (For further information, see Appendix E.)

c. State - Community Development Block Grants (CDBGs)

The town of Saugus can apply for CDBGs funds for a variety of community projects including downtown revitalization. Specific activities that are eligible include property acquisition, improvement, and disposition; rehabilitation loans, grants, or interest writedowns; public improvements to leverage private investment; and business-development assistance. Applications must be made by the town of Saugus and are submitted to the Executive Office of Communities and Development. (For further information contact the Division of Community Services, Executive Office of Communities and Development, 100 Cambridge Street, Boston, Massachusetts 02202.)

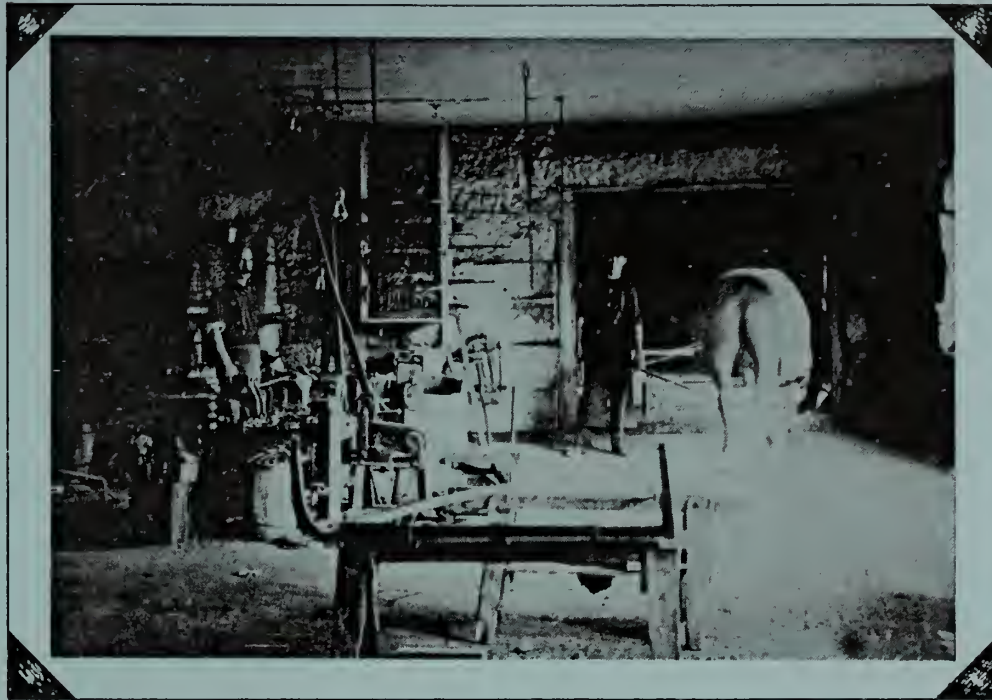
d. Federal - Small Business Administration (SBA) Section 7A: Loan Guarantees and Loan Program

The SBA aids small businesses that are unable to obtain conventional financing. Direct loans and loan guarantees may be used for business construction, expansion, or conversion of facilities and to purchase building materials or equipment.

Direct loans, which are currently being discouraged by the SBA, are available at below the prime rate. The maximum loan amount is \$150,000.

Guaranteed loans are insured for up to 90 percent, for loan amounts of up to \$500,000. Guarantees allow businesses to negotiate for a lower than usual rate with local banks. For further information contact your local bank or Doris McCarthy, SBA, 150 Causeway Street, Boston, MA 02114 (223-3224).





APPENDIX



APPENDIX A

CLIFTONDALE SQUARE BUSINESS SURVEY RESULTS

1. TYPE OF BUSINESS

Retail

Apparel	4%	
Drugs/Beauty Aids	4%	
Hardware/Building Supplies	4%	
Furniture/Appliances	0%	
Food/Liquor	6%	
General Merchandise ¹	2%	
Eating and Drinking	4%	
Miscellaneous Retail ²	13%	
Total Retail		37%

Services

Personal Services ³	15%	
Professional Services ⁴	40%	
Automotive	8%	
Total Services		63%

-
1. General Merchandise includes stores which sell a number of products, such as dry goods, apparel, furniture, and hardware. Department stores are included.
 2. Miscellaneous Retail includes stores not elsewhere classified, such as florists, jewelers and news stores.
 3. Personal Services includes establishments which provide for the care of a person or his/her apparel such as beauty shops and dry cleaners.
 4. Professional services includes businesses which provide services for fee or contract, such as doctors, lawyers, banks and insurance brokers.

2.	TYPE OF BUSINESS	
	Independent	94%
	Local Chain	6%
	National Chain	0%
3.	NUMBER OF YEARS IN BUSINESS	
	Less than 2 years	10%
	2-5 years	13%
	6-10 years	16%
	11-20 years	13%
	Over 20 years	48%
4.	DAYS OF OPERATION	
	Monday	84%
	Tuesday	100%
	Wednesday	94%
	Thursday	100%
	Friday	100%
	Saturday	84%
	Sunday	10%
	HOURS OF OPERATION	
	9a.m.-5p.m.: Mon-Fri.	71%
	Variable hours Mon.-Fri.	29%
	All day Saturday	48%
	Half-day Saturday	26%
	Open on Sunday	10%
	1 evening per week	13%
	More than 1 evening per week	29%
5.	BUSIEST DAYS	
	Monday	56%
	Tuesday	26%
	Wednesday	33%
	Thursday	59%
	Friday	48%
	Saturday	48%
	Sunday	7%

6.	AVERAGE AMOUNT SPENT PER CUSTOMER	
	Less than \$5	26%
	\$5 to \$10	13%
	\$10 to \$25	26%
	More than \$25	35%
7.	SALES TRENDS OVER LAST THREE YEARS	
	Up (by an average of 17%/yr.)	58%
	Constant	35%
	Down	7%
8.	OWN/RENT	
	Own	35%
	Rent	65%
	RENTS (Annual)	
	Range	\$1500-\$9600
	Average	\$3800
	Median	\$3300
9.	FLOOR SPACE	
	Range	150ft ² -9000ft ²
	Average	2200 ft. ²
	Median	1500 ft. ²
	Average rent per sq.ft.	\$6.10
10.	CHANGES BEING CONSIDERED	
	Expanding in Clifftondale Square	7%
	Moving out of Clifftondale Square	0%
	Changing goods or services offered	7%
	Storefront renovations	15%
	Interior renovations	15%
	None	56%
11.	EMPLOYEES	
	Full-time Total.....	153
	Range	0-40
	Average	5
	Median	3
	Part-time Total.....	64
	Range	1-40
	Average	2
	Median	1

12.	EMPLOYEES PRESENT AT ONE TIME	
	Total.....	160
	Range	1-40
	Average	5
	Median	3
13.	EMPLOYEES WHO DRIVE AND PARK	
	Park in lot on property	60%
	Park on-street	17%
	Park in church lot	23%
	SPACES OCCUPIED BY EMPLOYEES WHO PARK	
	Lots on property	76
	On-street spaces	29
	Church lot	58
	Total	163
14.	CUSTOMER PARKING PROVIDED	
	Yes	39%
	No	61%
	Spaces	108
	FREQUENCY OF USE OF CUSTOMER PARKING	
	Very often	69%
	Often	23%
	Not often	8%
15.	CUSTOMER PROFILE	
	Male	35%
	Female	65%
	Saugus resident	76%
	Resident elsewhere	24%
16.	PROBLEMS AFFECTING BUSINESS	
	Parking	41%
	Traffic	20%
	Vandalism	9%
	Lack of store variety	4%
	Competition from malls	17%
	Other	2%
	None	7%

17. POSITIVE CHARACTERISTICS OF CLIFTONDALE SQUARE

Convenient location	30%
Variety of goods and services offered	19%
Professional services offered and	
Post Office	13%
Community atmosphere	13%
Location in a heavily populated area	11%
Appearance	8%
MBTA service	3%
None	3%

18. SUGGESTED IMPROVEMENTS

Better parking facilities and	
enforcement of parking laws	60%
Relocate MBTA bus stops	6%
Make Jackson St. and Lincoln St.	
one-way	6%
Storefront renovations/improved	
appearance	6%
Greater store variety	6%
Other (low-cost loans; lighting;	
improve traffic)	10%
None	6%

APPENDIX B

CLIFTONDALE SQUARE SHOPPERS SURVEY

1. FREQUENCY OF TRIPS TO CLIFTONDALE SQUARE

Daily	43%
More than once a week	40%
About once a week	7%
About twice a month	7%
About once a month	3%
Less than once a month	0%

2. REASON FOR COMING TO CLIFTONDALE SQUARE

To shop	35%
To work	11%
For a professional service	29%
For a government service	25%

3. WHAT PRODUCT OR SERVICE ARE YOU SHOPPING FOR TODAY?

Food	14%
Clothing	8%
Jewelry	1%
Cards/gifts	11%
Drugs/health aids	9%
Tobacco products	4%
Bank	16%
Restaurant	6%
Hardware/building supplies	5%
Liquor	4%
Newspapers/magazines	6%
Florist	4%
Beauty parlor/barber	7%
Professional services	2%
Other	3%

4. WHY DO YOU SHOP IN CLIFTONDALE SQUARE?

Convenience	64%
Like the stores	21%
Like the services	11%
Other	4%

5.	ADDITIONAL GOODS AND SERVICES DESIRED	
	Restaurant/lounge	26%
	Clothing store	22%
	Shoe store	15%
	Supermarket/food	11%
	Parking	11%
	Miscellaneous retail	4%
	Other	5.5%
	None	5.5%
6.	AMOUNT SPENT PER TRIP	
	Less than \$5	23%
	\$5 to \$10	47%
	\$10 to \$25	23%
	More than \$25	7%
7.	TRANSPORTATION	
	Car	80%
	Walk	15%
	Bicycle	5%
	Bus	0%
8.	WHERE DID YOU PARK IF YOU DROVE?	
	On-street	68%
	Bank lot	13%
	Private lot	7%
	Brook's lot	4%
	Hoffman's lot	4%
	Church lot	4%
9.	LENGTH OF STAY IN CLIFTONDALE SQUARE	
	Under 15 minutes	10%
	15-30 minutes	41%
	30-60 minutes	23%
	1-2 hours	5%
	*Over 2 hours	21%
	(* of those staying over 2 hours, 91 percent worked in the Square)	

10. WHERE DO YOU LIVE?

Clifftondale Square	26%
Elsewhere in Saugus	55%
Lynn	4%
Revere	4%
Melrose	3%
Wakefield	1%
Malden	2%
Other	5%

11. WHERE ELSE DO YOU CONVENIENCE SHOP?

Saugus	59%
Lynn	6%
Revere	8%
Melrose	6%
Wakefield	1%
Lynnfield	1%
Malden	9%
*Other	10%

*Other includes:

Danvers	31%
Peabody	19%
Cambridge/Boston	19%
Miscellaneous	31%

12. WHERE ELSE DO YOU COMPARISON SHOP?

Saugus	52%
Lynn	4%
Revere	5%
Melrose	2%
Malden	9%
*Other	28%

*Other includes:

Danvers	37%
Peabody	37%
Cambridge/Boston	7%
Medford	7%
Miscellaneous	12%

13. MAJOR PROBLEMS IN CLIFTONDALE SQUARE	
Parking	44%
Traffic	30%
Rundown appearance	8%
Lack of store variety	14%
Other	4%
14. HAS THE QUALITY OF THE SQUARE CHANGED?	
Better	44%
No change	52%
Worse	4%
15. DESIRED IMPROVEMENTS	
More/better parking	32%
One-way street system/improve traffic	20%
Greater store variety	11%
Pedestrian mall on Lincoln Street	6%
Storefront improvements	6%
Widen Lincoln Street	5%
Improve general appearance	5%
Move MBTA bus stops	3%
Better police protection	3%
Other	6%
16. CUSTOMER AGE	
Child	0%
Teenager	21%
20-35	33%
35-50	26%
50-65	15%
Over 65	5%
17. CUSTOMER SEX	
Male	44%
Female	56%

DESIGN GUIDELINES

The following set of design guidelines was developed by the Clifftondale Merchants' Association in cooperation with the Metropolitan Area Planning Council. These guidelines are intended to help merchants, property owners, and the town make storefront and sidewalk improvements in keeping with the downtown-revitalization program now under way.

I. STOREFRONTSA. Considerations

1. Old Buildings. Older buildings add character and charm to a commercial area and should be preserved. This category includes a variety of older-style buildings with similar facade organization. The typical facade is made up of four horizontal zones with distinct architectural characteristics:

- the original storefront at ground level,
- a lower frieze above the storefront that usually contains a sign,
- upper floors with window openings regularly spaced, and
- the upper cornice.

2. New Buildings. This group includes buildings of more recent construction, which are generally plain, one-story structures. These buildings were built to be functional and are often hard or uninteresting-looking.

3. Storefronts

- To coordinate the different styles of old and new buildings, it is important to concentrate on street-level design. Signs, materials, colors, and choice of accessories on storefronts can be used to unify a streetscape.
- To create the best effect, storefront designs should be coordinated along an entire block. While identical storefronts and signs need not be used on each building, a block should project an overall "image" that is identifiable and attractive.

B. What To Look For

- Whenever possible, the original building design should be retained or restored.
- Maintenance is important - fixing broken glass, removing old signs, keeping sidewalks clean, etc.
- Masonry buildings should be cleaned where necessary. Water pressure, steam, or chemical cleaning is recommended above sand-blasting.
- Wooden buildings should be kept painted with consideration given to a color scheme. Too many colors on a building or a block are not attractive.
- Masonry repairs should be made wherever mortar is missing.
- Equipment, such as air conditioners or fans, should not be visible on the storefront.
- Original woodwork around windows and doors should be maintained or restored. Where it is necessary to replace wooden storefronts or windows, visually compatible new materials should be used.
- Window displays should be kept simple and attractive and changed frequently.
- Awnings, a traditional building accessory, are a functional, attractive and inexpensive means of unifying different building types and creating continuity. They screen unattractive storefronts, add color to the streetscape, protect window displays from harsh sunlight, and provide shade.

II. SIGNS

A. Considerations

- One of the most apparent elements of a building facade is a sign. A well-designed sign attracts attention and conveys a message. It should also add to the appearance of the building and help create a positive image for the storefront. In a commercial district, signs should be coordinated so that a good overall image of the shopping area is created.

- Merchants should review Saugus's sign bylaw before selecting a new sign. (See Zoning Bylaws Town of Saugus, Massachusetts, Article VII: Regulation of Advertising Signs and Billboards, July 1, 1978.)

B. What To Look For

1. Color

- The degree of contrast between words and background is most important.
- Keep the color scheme simple.
- Learn the effects of color.
- Sign color should be compatible with building color and that of neighboring signs.

2. Scale

- The scale and placement of a sign should be sympathetic to an observer. There are many types of signs -- wall, hanging or projecting, freestanding, awning, banner, window signs, supergraphics, temporary sign, window displays. After checking Saugus's sign bylaw for regulations concerning size, choose the type of sign and scale best suited to your business and the image you want to project.
- Sign size should be proportionate to storefronts.
- Words should be between 1/3 and 1/2 the height of the sign area.
- Number of words should be minimized.
- Brand names should be secondary to business identification.
- The weight and style of the typeface portray an image. Consider what you want, e.g., contemporary, elegant, etc.

3. Materials

- When selecting the sign material, consider desired effect or image, maintenance requirements, and price. (Always choose the best you can afford.)

-- Choice of Materials:

Wood is versatile, can be curved, laminated, painted, finished, or weathered. It comes in a variety of grains and textures, of course.

Metal is versatile, can be etched, cut, cast, embossed, wrought, rolled, extruded. It comes in a variety of coatings, finishes, and colors. It is reflective, durable, and needs minimum maintenance. Its main disadvantage is that it will rust if its protective finish is broken.

Plastic comes in a variety of shapes, colors, and textures. It can be transparent, translucent, or opaque. It is durable and can have concealed or internal lighting.

Cloth is easy and attractive material on which to silkscreen information. Its main disadvantage is that it deteriorates over time.

Glass can be transparent or translucent and it lends itself to internal-lighting techniques. Its disadvantage is breakage.

Stone, concrete, and brick are solid, durable, and can be incorporated into a building as relief.

Neon comes in a variety of shapes and colors. The light it gives off is constant, of low intensity, and needs no background. Its primary disadvantages is that it is easily damaged.

Letters on glass is an inexpensive and handsome way to create a sign. This type of sign should be kept at eye level.

Lighting: Indirect (florescent or incandescent), internal or backlighting can be used to draw attention to signs.

III. PEDESTRIAN WAYS AND AMENITIES

- Sidewalk surfaces should be in good condition, cracks filled.
- Pedestrian paths should link and unify parking and shopping areas.
- Sidewalks should be wide enough to accommodate pedestrian traffic, safe, well-lit, free of obstacles, and not in conflict with vehicular uses.
- Amenities, such as benches, lighting, and landscaping, should be provided.
- Generators and attractors of pedestrian activity (bus stops, schools, churches, etc.) should have adequate pedestrian access and amenities.
- Crosswalks should be clearly marked and located in areas that are both safe and convenient.

IV. LANDSCAPING, OPEN SPACE, AND GATEWAYS

- Landsacping should be used to soften buildings, break large expanses of asphalt, provide shade, accentuate desirable views or buffer unsightly areas. Trees, planters, and window boxes are effective ways to add landscaping to a downtown area.
- Open Space is important both to the overall appearance and to the functioning of a commercial district. Open space provides visual relief in an urban setting and ideally will contain pedestrian amenities such as benches or picnic tables. It is important that open space is well-landscaped, maintained, and accessible.
- Tree plantings, special pavings, overhead canopies, upright fixtures, and banners can be used to give definition to a town center. When placed at the edges or gateways of a downtown, such elements make people aware that they have arrived in a particular area. Handsome gateways, like good storefront signs, attract customers and help identify a commercial area.

- To survive city conditions, trees must be able to withstand a certain amount of air pollution and root compaction. They must also have rooting and branching characteristics that will not interfere with travel lanes, underground utilities, or overhead wires. Trees should be protected and maintained. Consult your local nursery for the best variety of tree for your downtown.

APPENDIX D

Cost Estimates

This list of provided to assist the Clifftondale Square Merchants Association and the town of Saugus in estimating the cost of improvements recommended in this report.

<u>ITEM</u>	<u>ESTIMATED UNIT COST</u>
Landscaping Materials	
Flowering Tree (6 feet height)	\$125.00 each
Flowering Shrub (2½ feet height)	\$50.00 each
Ground cover - Ivy sprigs	\$3.00 s.f.
Annual Flowers	\$2.25 s.f.
Street Furniture	
Benches	\$500.00 each
Planters - wooden	\$1,000.00 each
Crushed Stone for Planter	\$25.00 per planter
Topsoil for Planter	\$75.00 per planter
Underground Electric Service	\$30-60* per l.f.

*Estimate does not include cost of building connections.

APPENDIX E

INFORMATION: From the National Trust for Historic Preservation

Summary of Preservation Tax Incentives in the Economic Recovery Tax Act of 1981*

The Economic Recovery Tax Act of 1981, approved by President Reagan on August 13, 1981, makes dramatic and sweeping changes in the federal tax treatment of investment in real estate. The Internal Revenue Code was revised to add a new accelerated cost recovery system, to repeal existing incentives for rehabilitation of certified historic buildings and to substitute a new three-tiered investment tax credit (ITC) for rehabilitation. The bias in favor of new construction was effectively eliminated. The tax incentives for rehabilitating older buildings were simplified and substantially improved, especially in the case of historic buildings.

The investment tax credit now allowed for certified historic rehabilitation should be a significant stimulus to the identification and designation of individual historic buildings, as well as historic commercial districts and residential neighborhoods.

Purpose of the Reform

The reasons underlying this major reform of the tax incentives for rehabilitation of older and historic buildings, originally authorized in the Tax Reform Act of 1976, are described in the Senate Committee on Finance's report accompanying the bill:

- The tax incentives for capital formation provided in other sections of this bill might have the unintended and undesirable effect of reducing the relative attractiveness of the existing structures. Investments in new structures and new locations, however, do not necessarily promote economic recovery if they are at the expense of older structures, neighborhoods, and regions. A new structure with new equipment may add little to capital formation or productivity if it simply replaces an existing plant in an older structure in which the new equipment could have been installed. Furthermore, the relocation of business can result in substantial hardship for individuals and communities.

*Information sheet No.30. 1981, the National Trust for Historic Preservation in the United States. Reprinted by permission of the National Trust for Historic Preservation.

Since this hardship does not affect the profitability of the business, it may not have been fully taken into account in the decision to relocate, even though it is an economic detriment to the society as a whole.

The increased credit for rehabilitation expenditures is intended to help revitalize the economic prospects of older locations and prevent the decay and deterioration characteristic of distressed economic areas.

Revised Investment Tax Credit for Qualified Rehabilitation

The new ITC for qualified rehabilitation, effective January 1, 1982, is as follows: 15 percent for structures at least 30 years old, 20 percent for structures at least 40 years old and 25 percent for certified historic structures. No ITC is allowed for rehabilitation of a building, other than a certified historic structure, less than 30 years old. A qualified rehabilitation means any building that has been substantially rehabilitated, that was in use prior to beginning the rehabilitation and that retains at least 75 percent of the existing external walls.

An ITC may be deducted from the amount of taxes owed, in contrast to a deduction, which merely reduces a taxpayer's income subject to taxation.

Eligible Categories of Rehabilitation

The 25 percent credit for certified historic rehabilitation is available to both depreciable nonresidential and residential buildings. However, the 15 and 20 percent credits are limited, as under present law, to nonresidential industrial and commercial buildings used for income-producing purposes. Thus, Congress has included a significant incentive for the creation of rental housing in historic buildings.

A certified historic building owned and occupied in part by a taxpayer will qualify for the credit, on a pro-rata basis, for that portion of the building that is income-producing.

Substantial Rehabilitation Test

The Economic Recovery Tax Act of 1981 allows ITC only if there has been a substantial rehabilitation of a building. This means that the rehabilitation expenditures must exceed the greater of either the taxpayer's adjusted basis in the property (cost of the building plus capital improvements, less depreciation) or \$5,000 within a 24-month period.

The act provides an alternative 60-month period to meet the substantial rehabilitation test in the case of any rehabilitation that may reasonably be expected to be completed in phases set forth in architectural plans completed before the rehabilitation begins. This restrictive substantial rehabilitation test will disqualify a substantial number of the projects now being certified under the preservation tax incentives, according to the U.S. Department of the Interior.

Adjustment to Basis Rule

Only a certified rehabilitation of a historic structure qualifies to depreciate the full amount of rehabilitation expenditures because certified historic structures are exempt from the adjustment to basis rule. This rule requires that the tax credit be subtracted from the total rehabilitation costs in computing the amount to be depreciated. For example, in the case of a \$100,000 rehabilitation of a 40-year-old building, the 20 percent ITC of \$20,000 can be deducted from taxes owed, but only the remainder, \$80,000, can be depreciated.

This adjustment to basis rule is designed to favor certified historic rehabilitations. When coupled with the additional 5 percent credit, the margin of tax savings for certified rehabilitation of historic properties is substantial.

Who May Take the ITC

The ITC may be taken by the owner or owners of an eligible building when expenditures are incurred on a qualified rehabilitation. The act further amends current investment credit limitations so that the owner of a rehabilitated building leased and used by a tax-exempt organization or governmental unit is allowed the ITC. This provision was made effective retroactive to July 30, 1980. In addition, a lessee is eligible for the ITC for qualified rehabilitation expenditures incurred by the lessee if, on the date the rehabilitation is completed, the remaining term of the lease is at least 15 years.

Which Buildings Qualify as Historic

As under existing law, a building may be certified by the Secretary of the Interior as historic if (1) it is listed in the National Register of Historic Places or (2) it is located in a registered historic district and the secretary certifies that the building is of historic significance to the district. A registered historic district is one listed in the National Register of Historic Places

or one designated by a state or local government under a statute certified by the secretary, in which case the secretary must also certify the district itself.

To qualify for the 25 percent ITC and to assure consistent standards of quality of rehabilitation of certified historic structures, the rehabilitation must be certified by the secretary as being consistent with the historic character of the building or the district in which the building is located. Thus, the act creates a presumption that a building within a district is historic; and any rehabilitation must be certified to qualify for the ITC. On the other hand, if a building is not of historic significance to a district, it can be certified as such by the secretary to avoid these limitations and qualify for the lesser tax credits.

The existing certification process, administered for the Secretary of the Interior by the National Park Service in cooperation with the state historic preservation officers, will be used to identify eligible buildings and qualify their rehabilitations for the new ITC.

Changes to Existing Preservation Tax Incentives

In an effort to simplify the tax law and to improve the incentives for rehabilitation, the act repeals the current preservation tax incentives and replaces them, effective January 1, 1982, with the new 25 percent ITC. In addition to repealing the 10 percent ITC, the act repealed the following provisions:

- 60-month amortization of certified historic rehabilitation expenditures (Internal Revenue Code 191).
- accelerated depreciation of substantially rehabilitated certified historic structures (Code 167 (o)); and
- denial of accelerated depreciation for a building constructed or reconstructed on the site of a demolished or substantially altered certified historic structure (Code 167(n)).

The rule in 280B of the Internal Revenue Code, requiring demolition costs to be capitalized as part of the cost of the land rather than deducted, is retained.

Tax Preferences and Recapture

Repeal of Internal Revenue Code 167(o) and 191 removed tax incentives for historic structures from the category of tax preferences. Under the old law, the 60-month amortization and accelerated depreciation incentives were treated as items of tax preference, thereby subjecting the taxpayer to a minimum tax of 15 percent on these items, often in addition to the taxpayer's regular liability. Because neither the ITC nor the straight-line method of depreciation are classified as items of tax preference, taxpayers investing in qualified rehabilitations are no longer subject to the minimum tax penalty.

Repeal of these sections also substantially alleviated the recapture problems previously associated with the historic preservation tax incentives. Under the recapture rules applicable to early disposition of real estate prior to passage of the act, depreciation in excess of that which would have been allowable under the straight-line method (depreciation computed in equal amounts over the recovery period) was subject to recapture -- that is, to being taxed as income to the taxpayer in the year of disposal.

The availability of an ITC for qualified rehabilitations, if taken with straight-line depreciation, eliminates the recapture problem associated with the historic preservation tax incentives under the old law. However, premature disposal of a qualified rehabilitated building may still result in recapture of a portion of the ITC.

Generally, if a qualified rehabilitated building is held by the taxpayer for longer than five years after the rehabilitation is completed and the building is placed in service, there is no recapture of the ITC. If the property is disposed of after a holding period of less than one year after it is placed in service, 100 percent of the ITC is recaptured. For properties held between one and five years, the ITC recapture amount is reduced by 20 percent per year as follows:

<u>Years Held</u>	<u>Percentage of Recapture</u>
less than 1 year	100
2 years	80
2-3 years	60
3-4 years	40
4-5 years	20
5 or more years	0

Impact on Projects in Process

Generally, the act applies to all expenditures incurred after December 31, 1981. A transition rule, however, permits projects on which the physical work began before January 1, 1982, to use a combination of the old and new law. Consequently, if qualified historic rehabilitation expenditures are incurred before and after January 1, 1982, prior expenditures can qualify for the present 10 percent ITC (plus accelerated depreciation) or 60-month amortization. Expenditures incurred on or after January 1, 1982, will continue to be treated under the old law unless the rehabilitation meets the new law's substantial rehabilitation test. If the test is met, the new law applies, and the 25 percent ITC is the only tax incentive option. Rehabilitation work on 20 to 30-year-old buildings begun before January 1, 1982, may continue to qualify under the provisions of the old law until completion if the rehabilitation would have qualified under the old law.

Depreciation under the Accelerated Cost Recovery System

Under the new accelerated cost recovery system added by the act (effective retroactive to January 1, 1981), the present system of depreciation over a building's useful life is replaced by a system permitting recovery of capital costs, using a straight-line or accelerated methods, over predetermined recovery periods. Eligible real property is assigned a 15-year recovery period, but taxpayers may elect a 35 or 45-year extended recovery period.

The methods of cost recovery and recovery periods are the same for both new and used property. Therefore, Congress has eliminated

from the Internal Revenue Code the long-standing bias in favor of new construction. In recognition of the economic and social advantages of rehabilitation, there is now a clear incentive for qualified rehabilitations.

The ITC is allowable only if a taxpayer elects to use the straight-line method of depreciation with respect to qualified rehabilitation expenditures. If a taxpayer elects to use an accelerated form of depreciation (175 percent declining balance method for all but low-income housing, which qualifies for 200 percent declining balance method), the taxpayer cannot qualify for an otherwise allowable ITC for qualified rehabilitation expenditures. Composite depreciation is required if an accelerated method of depreciation is elected.

Comparative Advantage of
Certified Historic Rehabilitations

The act reflects a definite intent of Congress and the Reagan administration to encourage reinvestment in America's historic buildings, commercial districts and neighborhoods. The 25 percent ITC for certified historic structures is the most beneficial tax treatment available for real estate investment under the amended Internal Revenue Code. The margin of incentive for certified historic structures over other rehabilitations is substantial because of the additional 5 percent credit and the exemption of historic structures from the adjustment to basis rule.

Generally, the ITC allowed for rehabilitations is more beneficial in terms of immediate tax savings than any form of accelerated or straight-line depreciation. Further, because only straight-line depreciation may be taken with the ITC for qualified rehabilitation expenditures, disposition of a qualified rehabilitated building for which the ITC has been taken does not trigger, with respect to the rehabilitation expenditures, the recapture rules related to accelerated depreciation. Because there is no accelerated depreciation, there is no tax preference income subject to the Codes minimum tax rules.

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The opinions expressed in this Information sheet are not necessarily those of the National Trust.

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SPECIAL THANKS

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